Transformationen wagen

Method set

Transformation workshop

Adapted from the Handbuch *Öffentliches Gestalten*, expanded by Caroline Paulick-Thiel & Henrike Arlt with the collaboration of Blasius Walch & Philipp Rösler, Politics for Tomorrow / nextlearning e. V.

Commissioned by the Federal Environment Agency, July 2021

Bundesministerium für Umwelt, Naturschutz und Reaktorsicherheit
Umwelt Bundesamt
ffu Forschungszentrum für Umweltpolitik
Politics for Tomorrow

The Transformation Workshop was developed as part of the research project "Transformations wagen" by the Environmental Policy Research Centre of the Free University of Berlin and Politics for Tomorrow / nextlearning e. V. and funded by the Departmental Research Plan of the Federal Ministry for the Environment on behalf of the Federal Environment Agency (FKZ: 3717 11 01 2).

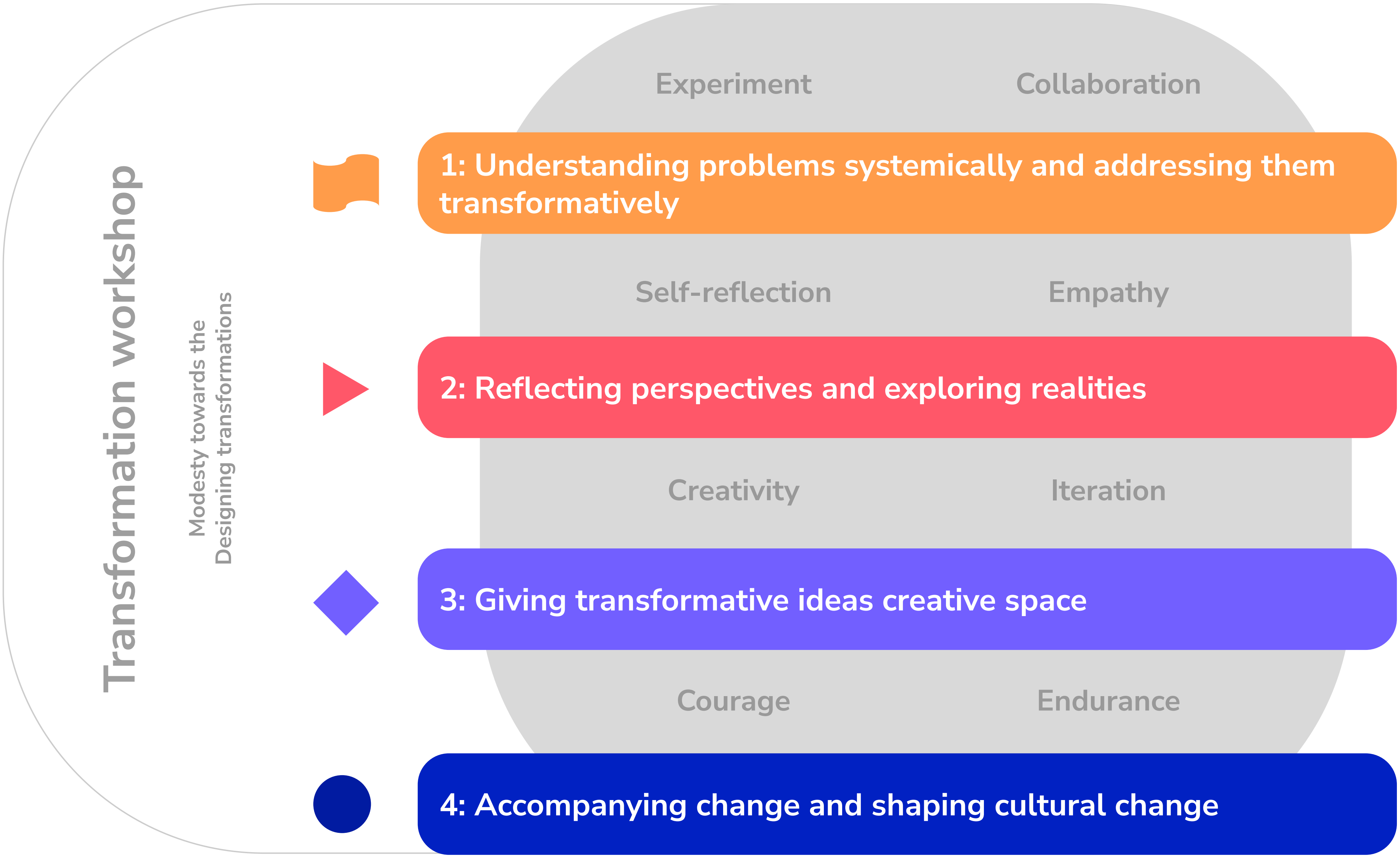
Overview methods

Module	Day	Method name	Key figure*
M0.1	1	Work well together	M011
M0.2	1	Visual coordination	M012
M1.1	1	Warm Data Exploration	M111
M1.2	1	Cause localisation in the iceberg	M112
M1.3	2	Illuminate system dynamics	M121
M1.3	2	Framing the challenge	M121T
M0	2	Team profile	M021
M1 → M2	Action phase	Knowledge Atlas	AP101
M1 → M2	Action phase	Identify actors	AP102T
M2.1	1	Transformative actor analysis	M211
M2.2	1	Actor understanding	M212
M2.2	1	Clarify assumptions	M213
M2I	Info sheet	Set aside prejudices	M213I
M2.3	2	Develop interview guidelines	M221
M2 → M3	Action phase	Prepare the basis for a discussion	AP201
M2 → M3	Action phase	Document conversations	AP202
M3.0	1	Individual interview evaluation	M311
M3.0	1	"How can we ..." Question	M312

*The method indicator is composed of:
1.) Module, 2.) Workshop day, 3.) Method number

Module	Day	Method name	Key figure*
*M3.1	1	Impact staircase with impact assessment	M313
M3.1	1	Vision Statement	M313T
M3.2	1	Identify leverage points	M314
M3.2	1	Creative cartwheel	M315
M3.2	1	Idea napkin	M316
M3.3	2	Create test base	M321
M3.3	2	Concept prototypes	M322a
M3.3	2	Future Theatre	M322b
M3.3	2	Test prototypes	M323
M3 → M4	Action phase	Persona profile	AP301
M3 → M4	Action phase	Plan the test procedure	AP302
M3 → M4	Action phase	Evaluate test	AP303
M4.0	1	Golden circle	M411
M4.1	1	Explore Exnovation	M412
M4.1	1	Changing cultures	M413
M4.2	1	Routine loop	M414
M4.3	2	Storytelling blueprint	M421
M4.3	2	Communication pyramid	M422
M4.3	2	Future slide set	M423

Attitudes supported by the methods



Work well together

Time frame
5 - 10 minutes

Level
Simply

Materials
Adhesive dots or alternatively different coloured pens

Rollers
Moderation
Documentation
Time management

Basic posture
Collaboration - stimulating the interaction of different actors and using their diversity of perspectives
Empathy - seeing and wanting to take other perspectives

What & For What?
In the core team, all persons are learners and teachers at the same time. At the beginning of the teamwork, it is important to agree on the principles of an appreciative and productive working attitude. This makes it easier to practise new routines, building on them and to focus energy on the really important moments of creation.

Added value
Different points of view are the lifeblood of good teamwork. In order to work on a common cause in a problem-oriented way, it is important to use different opinions constructively and temporarily discard hierarchies. Personal, everyday and current whims can simply be included in a playful way.

Contextual knowledge
Good processes live through communication. Especially when a dynamic approach and a flexible attitude are required, foundations are needed that promote openness, understanding and learning. In the iterative development steps, the team members come close to each other and have gone through thick and thin by the end of the innovation process.

Procedure

Valuing time together

Time is an important and always scarce resource. Timeboxing - the strict limitation of time for individual work steps - helps small teams and large groups to use common work moments in a disciplined way. Everyone should be heard and every idea should be taken into account. This approach often releases creativity. And with a bit of practice, the focus is precisely on the topic and not on rambling descriptions.

Document rotating

The comprehensible documentation of the individual steps is fundamental so that interim results can be jointly developed further. This knowledge base makes it possible to inform oneself in an uncomplicated way, to discuss data-based issues and to prepare and make solution-oriented decisions. Documentation is a demanding task that is taken on by different people on a rotating basis.

Teams via tools

Manuals or management guides with countless tools and methods fill entire bookshelves - even in the public sector. Ultimately, however, it is often not the tools that determine the success of a company, but the way they are used and with what intention. Attitude thus defines design. The key to successful transformations are the people and their interaction with each other.

Note: Use modi operandi on the next page for checking in with the main team and ask: What can I do very well? - Give a green point / What would I like to be better at? - give a yellow point / discuss the picture that has emerged.

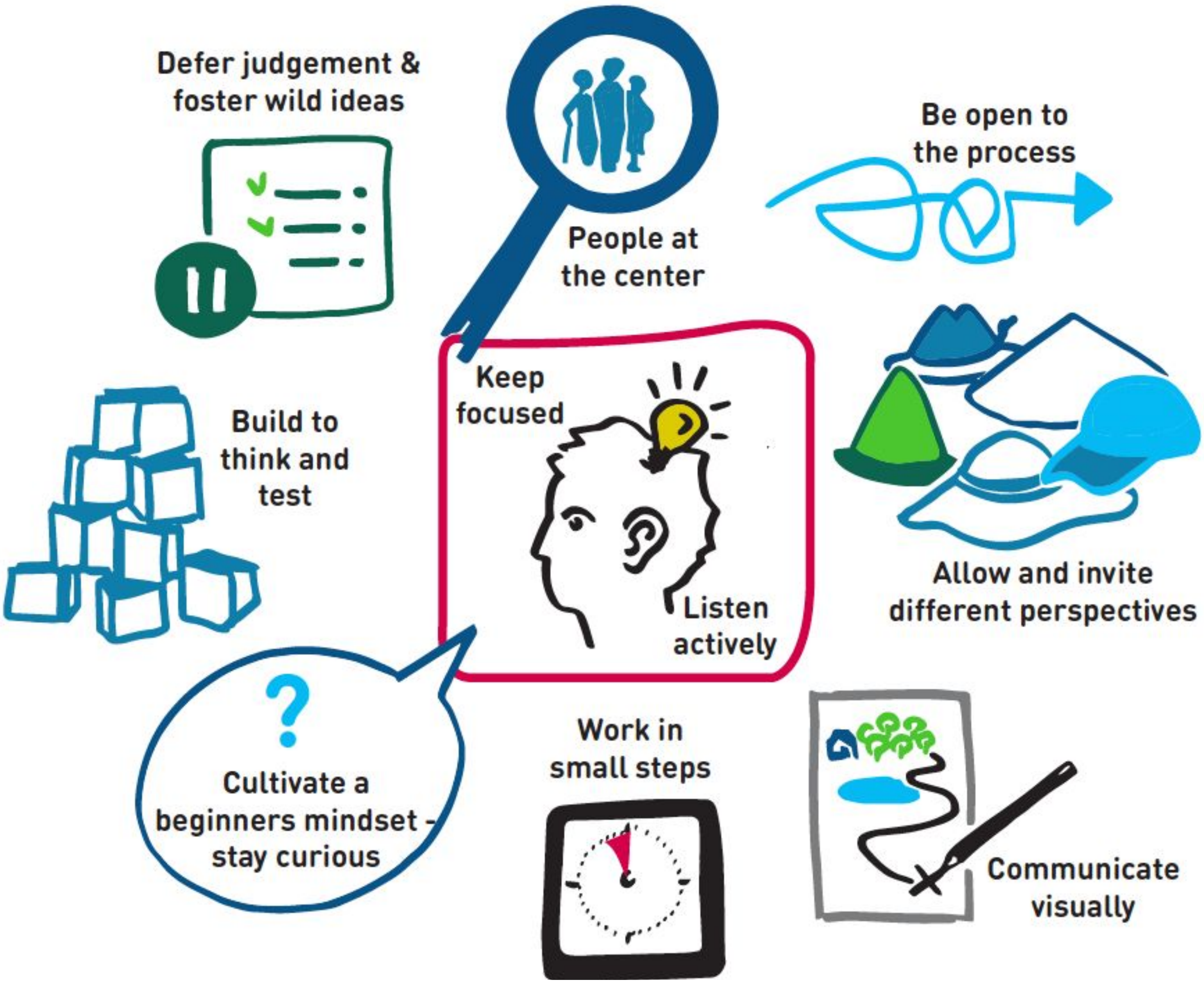

Defer judgement &
foster wild ideas
People at
the center
Be open to
the process
Keep
focused
Listen
actively
Build to
think and
test
Allow and invite
different perspectives
Cultivate a
beginners mindset -
stay curious
Work in
small steps
Communicate
visually

Fig.

Visual coordination

Time frame
5 - 10 minutes

Level
Simply

Materials
Adhesive dots or alternatively different coloured pens

Rollers
Moderation
Documentation
Time management

Basic posture
Collaboration - stimulating the interaction of different actors and using their diversity of perspectives
Iteration - welcoming complexity and resistance

What & What For?
Visual voting is a simple and quick way to prioritise ideas. All members of a group are involved to make a choice and prepare decisions. By scoring individual aspects or proposals, a visual tendency picture is created within a few minutes.

Added value
This type of voting is universally applicable and can be extended as desired: for single-colour variants, the quantity determines, for multi-colour variants, the importance of the colours is also relevant. By placing coloured dots or elements, each person can individually vote on the importance of diverse aspects that require prioritisation.

Contextual knowledge
The point selection should not be used for final decisions. The procedure presupposes that the participants know, check and compare all options before they stick to their points. Therefore, it is recommended to condense similar aspects into clusters in advance and to evaluate them.

Procedure

1. Write all the options to be voted on sticky notes and group them or write them down as a list on a large piece of paper.
2. Communicate the focus of the vote. Remind participants the purpose of the vote before it takes place. Why is the vote being taken and how will the result be used?
3. Set rules for voting together (see examples).
4. Announce the number of votes each participant has. As a rule of thumb, the number corresponds to about a quarter of the options to be voted on.
5. Silence and vote at the same time. During the voting process it is important not to influence and lobby each other. A conversation takes place only after the vote has been cast.
6. Evaluate the result. Then discuss the options that received the most votes. Which priorities can be identified? Why did who vote for certain options? Draw up a joint ranking list.

   In case of a tie: Re-vote top options from the previous vote (max. 4) to ensure clarity. Repeat steps 03 to 06 with this focus.

Suggestion: Visual voting can also be done and documented digitally. Try out online tools.

Set rules for voting together

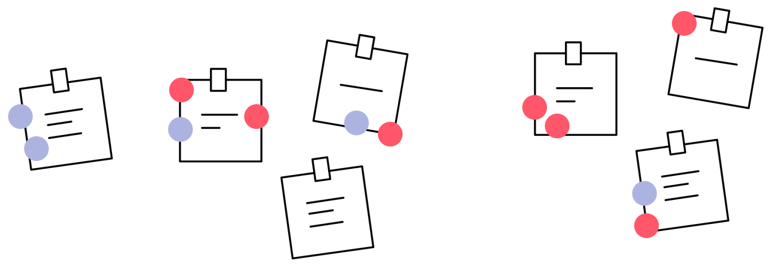
In order to counteract biased voting, it is important to set the rules for voting together. Different options are:

A) **Pre-decide & write down.** Each person writes their votes on a sticky note before their point votes are placed. This technique helps to hold everyone accountable for sticking to the original vote.

A) **Dictate the order of voting** to prevent biased voting due to the HIPPO (Highest Paid Person's Opinion) effect. Junior participants are first in line, while stakeholders or subject matter experts are at the end. This approach protects the voices of those who might otherwise make less authentic contributions and automatically refer to superiors.

A) **Determine further restrictions such** as: Voting only on criteria where there is 1) ownership or 2) expertise.

A) **Vary voting quality**, for example: use small and large dots to assess relevance or use multiple colours for categories such as "Should we definitely do this", "Need to understand better or discuss in more detail first", "Should not consider", "Should consider"



Example of instructions for online voting

In a virtual context, detailed preparation and small-step instructions are needed for the chosen medium. Meeting participants can comment on the content of a shared screen. Example medium: Zoom.

- **Share screen.**
- **Prepare together:** Ask everyone to study the content first.
- **Explain the comment function:** Click on Options at the top of the shared screen. Select a stamp here, e.g. star. Do not use yet!
- **Explain commenting procedure:** Communicate voting focus. Set voting rules.
- **Silent and simultaneous voting:** Only after a drawing is given by the moderator, the participants of the video conference evaluate the released content synchronously.
- **Evaluate result.**
- **Discuss next steps.**

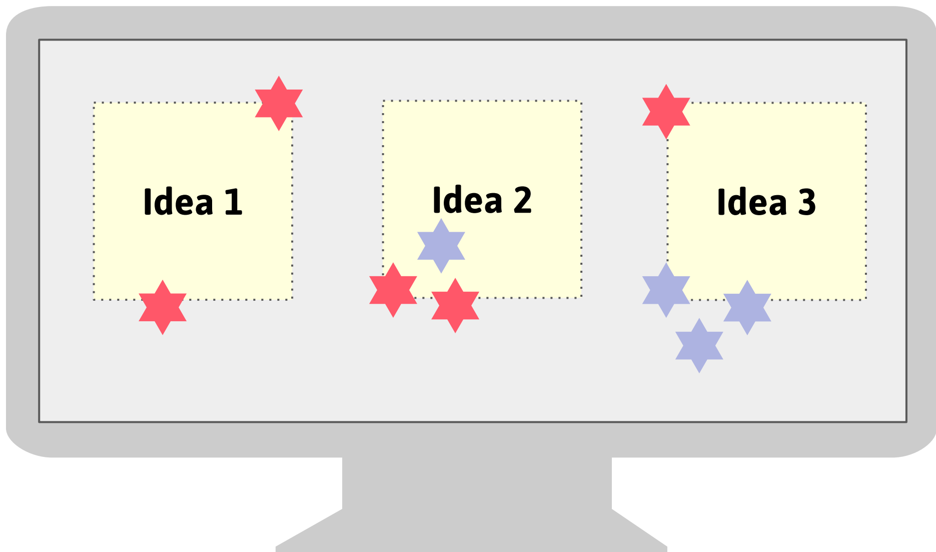


Fig.: Köbler, 2020 / Pacheco, 2020

Team profile

Time frame
5 - 20 minutes

Level
Simply

Materials
Adhesive dots or alternatively different coloured pens

Rollers
Moderation
Documentation
Time management

Basic posture
Collaboration - using diversity of perspectives
Self-reflection - Reflecting self-critically on one's own role

What & What For?
With the team profile, a strong and balanced group can be assembled combining all the necessary skills for effective design work. Professional stations in the CV or certified knowledge count just as much as personal experience or a sense of humour.

Added value
Self-assessment is used to determine which role is right for each team member. This honest reflection provides a good starting point for reordering habitual patterns of cooperation and consciously setting out together.

Contextual knowledge
All people have different thinking preferences. Based on the Whole Brain model, N. Herrmann has developed an HBDI profile with which each different thinking styles can be analysed. A functional team consists of people who complement each other in all thinking styles.

Procedure

Team profile

1. List all team members. Who should be involved, how, when and why?
2. Assess the intended core team. Where might individual preferences, strengths and weaknesses lie?
3. Minimise or completely eliminate analysed weaknesses. Is a certain technical expertise necessary? If so, what is it? Is this available internally, or should external partners be involved?
4. Enable team building. How can it be ensured that the people being considered are interested in working together? What do they need to join in?

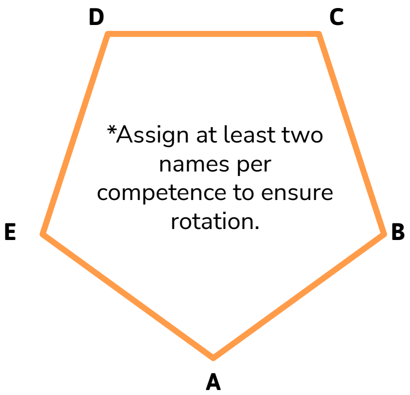
Note: Discuss the choice of potential team members with colleagues and supervisors. Promote cooperation between departments, hierarchical levels and generations.

Self-assessment

- Take a pencil and mark per skill what you CAN do particularly well. Connect individual scale points to form a shape.
- Use a second pen colour per skill to mark what you WANT to bring into the process. Connect individual scale points again to form a shape.
- Look at the intermediate space that has emerged and the I WOULD LIKE TO potential that is characterised by it. This area makes visible where there is motivation to actively learn and try something new.

Team profile

For each person who is to be part of the core team, circle the two* most pronounced competences and tick what the person is particularly good at:



A: Connecting competences
Who is specially:
- ❏ Communicative
- ❏ Appreciative
- ❏ Negotiating
- ❏ Strategic
- ❏ Ready to learn
- ❏ Pioneering

B: Emotional competence
Who is specially:
- ❏ Intuitive
- ❏ Empathic
- ❏ Emotional
- ❏ Spiritual
- ❏ Symbolic
- ❏ Expressive

C: Experimental competence
Who is specially:
- ❏ Curious
- ❏ Creative
- ❏ Spontaneous
- ❏ Conceptual
- ❏ Artistic
- ❏ Risk-taking

D: Rational competence
Who is specially:
- ❏ Analytical
- ❏ Logical
- ❏ Factual
- ❏ Quantitative
- ❏ Critical
- ❏ Realistic

E: Organisational competence
Who is specially:
- ❏ Structured
- ❏ Detailed
- ❏ Planned
- ❏ Controlled
- ❏ On time
- ❏ Reliable

Each person fills in the middle circle for themselves:
- What I CAN do particularly well
- What I WILL bring to the process
- Identify like potential

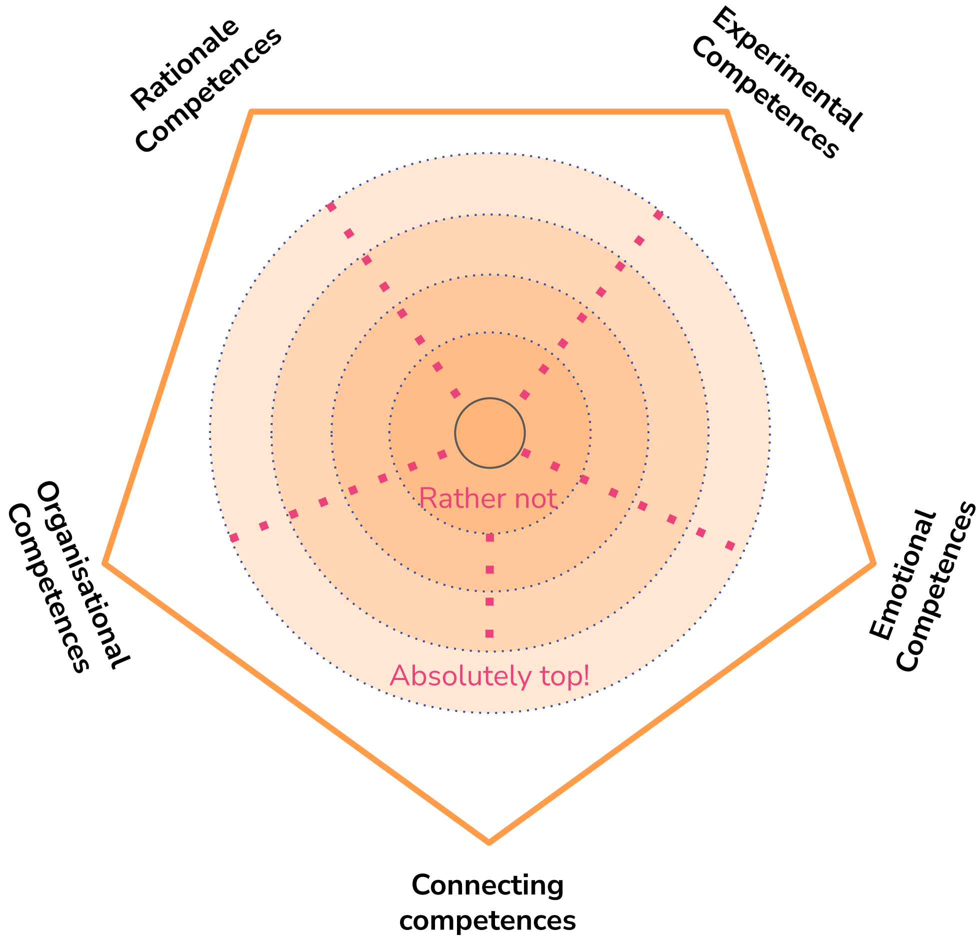


Fig.: based on Hermann 1996, modified by Paulick-Thiel & Arlt, 2020

Warm Data Exploration

Materials
Chair circles with labels

Time frame
60-90 minutes

Rollers
Moderation
Documentation
Time management

Basic posture
Self-reflection - developing realistic expectations of whether and how intensively transformations can be influenced
Empathy - seeing and wanting to take other perspectives

What and what for?
Warm Data Labs or explorations are group processes that illustrate interdependencies, generate an understanding of systemic patterns and illustrate systems theory approaches in a tangible way. The resulting cross-contextual knowledge is "warm data".

Added value:
Warm Data Labs enable new societal responses to complex challenges.
The process supports groups to strengthen their collective capacity to perceive, discuss and explore complex issues. Shifting perspectives increases the ability to deal with difficult or "convoluted" issues.

Contextual knowledge:
Nora Bateson defines warm data as contextual and relational information about complex systems, i.e. it is transcontextual information about the relationships that integrate a complex system, as well as interwoven complex systems. She coined the term in 2021. More at: https://batesoninstitute.org/warm-data-labs/

Procedure

1. Set up eight circles of chairs with 3-5 chairs in the room. Label each circle of chairs with a "context": ecology, economy, technology, politics, administration, culture, identity, family.

2. Each participant receives a copy of the template and a pen for taking notes. Introduce the task and the process of the exploration. Participants have 45 minutes. They are invited to explore 3 different "contexts" in conversation with others. The task is to find out what transformation means in the different contexts.

Note: In the conversations, appreciative interaction and active listening is important for the exploration. There is no time limit for staying in the chosen "contexts". The participants enter a circle of chairs and the conversations there on their own initiative. They stay as long as they want to explore the context for their collection of knowledge and leave it when they are ready for a new one. Then they switch to their chosen 2nd or 3rd "context".

1. Finally, bring all participants together in a large circle. Invite each participant to write down the three most important insights from this experience on Post-Its. One aspect per sticky note.

2. Open plenary to give everyone the opportunity to share their thoughts. All participants briefly present the insights from their discussions. The facilitator clusters the notes on a wall and makes the contextual knowledge visible in the room. The aim is to jointly generate new knowledge for understanding transformations.

Mission and procedure of the exploration

1. Choose 3 contexts that interest you or arouse your curiosity.
2. Write your selection in the prepared note fields on the right.
3. Go to your first chosen context and talk to the people you meet there about the meaning of transformation in that context.
4. Make a note of what your counterpart said about the meaning in the corresponding field of knowledge.

3

45 min

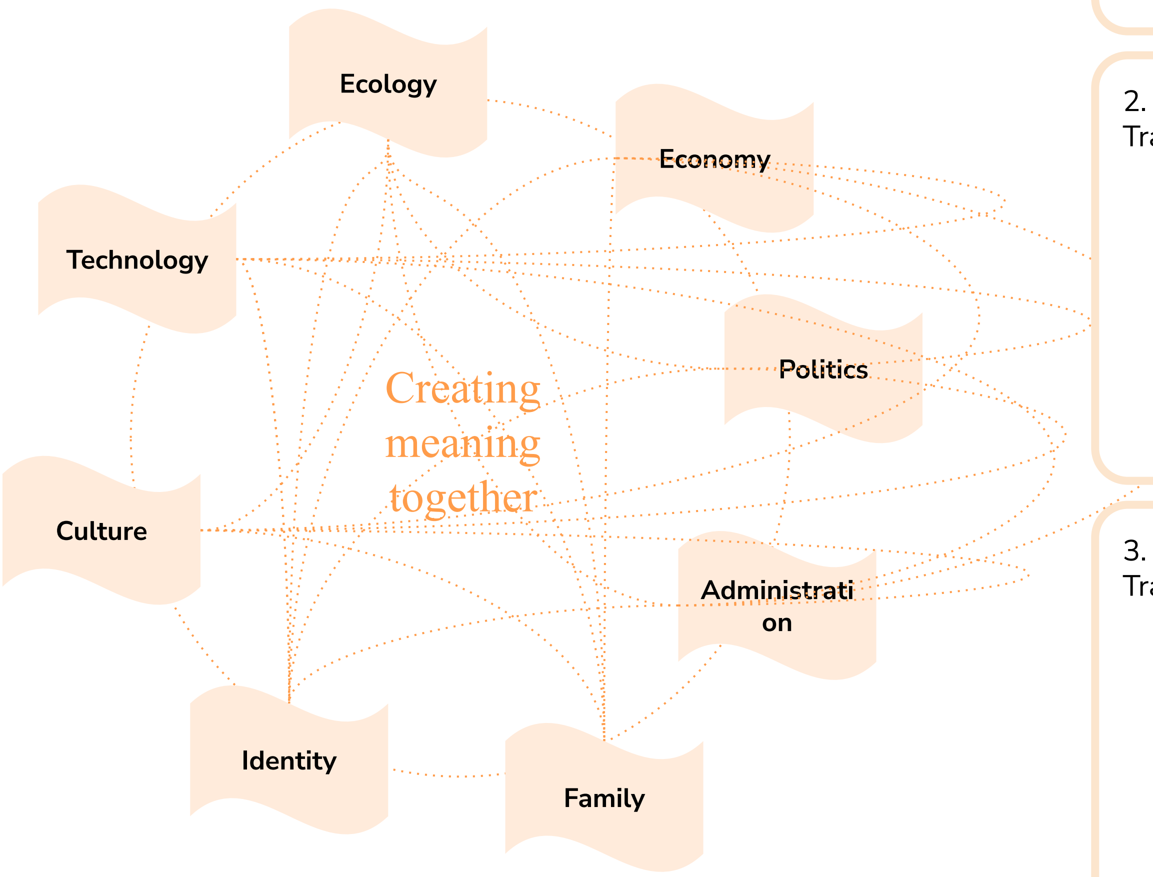


Fig. : based on Warm Data Lab, adapted by Paulick-Thiel & Arlt, 2021

Findings from my exploration / notes

1. selected context: ___________________________________
Transformation here means:

2. selected context: ___________________________________
Transformation here means:

3. selected context: ___________________________________
Transformation here means:

Cause localisation in the iceberg

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
45-50 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Iteration - welcoming complexity and resistance

What and what for?
Visible consequences of multi-layered, complex problems are usually only symptoms of deeper causes. The aim of localising the causes is to explore them in more detail and to name them explicitly in order to be able to change them systematically.

Added value:
Those who thoroughly address the causes prevent continuous symptom control and in this way use more powerful levers to their own advantage. In addition, the use of the method sharpens the understanding of the problem.

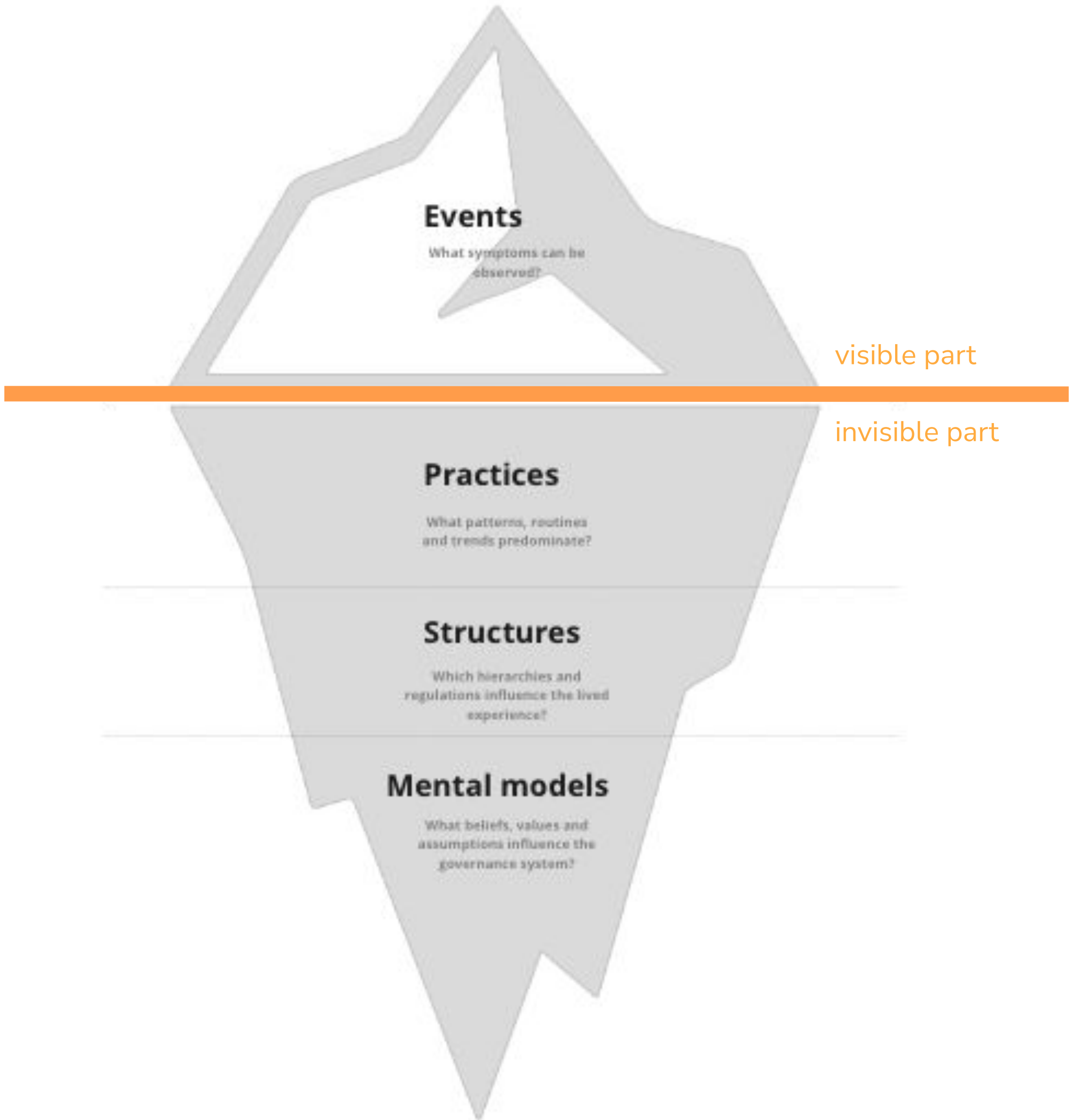
Contextual knowledge:
This method exists in different versions and is also known as the 'Iceberg Model' or 'Causal Layered Analysis'. All approaches are based on the consideration of conscious and unconscious or visible and invisible parts. The unconscious or invisible part is proportionally much larger and has hidden implications in transformation processes. If these can be decoded and made explicit, interventions can be planned in a more targeted way and are more promising.

Procedure

1. Transfer iceberg scheme. Write the challenge or focus to be worked on the sheet.
2. Work on the individual sections of the iceberg from top to bottom. Use the impulse question in the template to focus on the problem.
3. Start with the visible part of the iceberg. Share own observations and experiences of events alone or directly in the group. Note down every symptom that is relevant in the context of the problem.
4. Move to the invisible part of the iceberg. First look at practices. Note every routine, pattern and trend that directly or indirectly facilitates events.
5. Move to the level of structures. Note down every rule and hierarchical or system level that influences or conditions the lived practice.
6. Switch to the last level in the iceberg. Explore the mental models embedded in the structures under consideration. Note every belief, value and assumption that influences the system under consideration.
7. Finally, look at the whole iceberg across the level boundaries. Sift through the post-its within the group and discuss. What direct and indirect connections exist between the noted points in the different levels? Connect them with arrows on the template to visually secure the results.

Addition: Highlight problem aspects to which group members have direct access with a sticky dot. They may be suitable for future systemic interventions.

Focus of consideration:



Note: If there are already assumptions about structural causes through insights or direct experiences, one can start from this level and derive further connections from there. Otherwise, starting from the 'events', try to put together a conclusive causal chain up to the level of the 'mental models' - or vice versa!

Fig.: based on Freud's theory, metaphor by Hemingway, 1930s

Illuminate system dynamics

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
45-60 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Iteration - welcoming complexity and resistance
Collaboration - using diversity of perspectives

What and what for?
Transformations proceed dynamically and in unpredictable ways. Nevertheless, dynamics can be traced and located with regard to the current state of the system.

Added value:
In order to better understand the direction and dynamics of transformations, it makes sense to examine current trends and compare them directly with possible, desirable (and so far missing) system dynamics. This opens up a possibility space consisting of actual and target states, which can be played with through concrete next steps towards a desirable future.

Contextual knowledge:
Imagining (un)possible, preferred futures together with their system dynamics is the first step towards achieving them. This very pragmatic imagination serves us as a model for the development of very real, concrete tasks to guide transformation processes into preferred paths.

Procedure

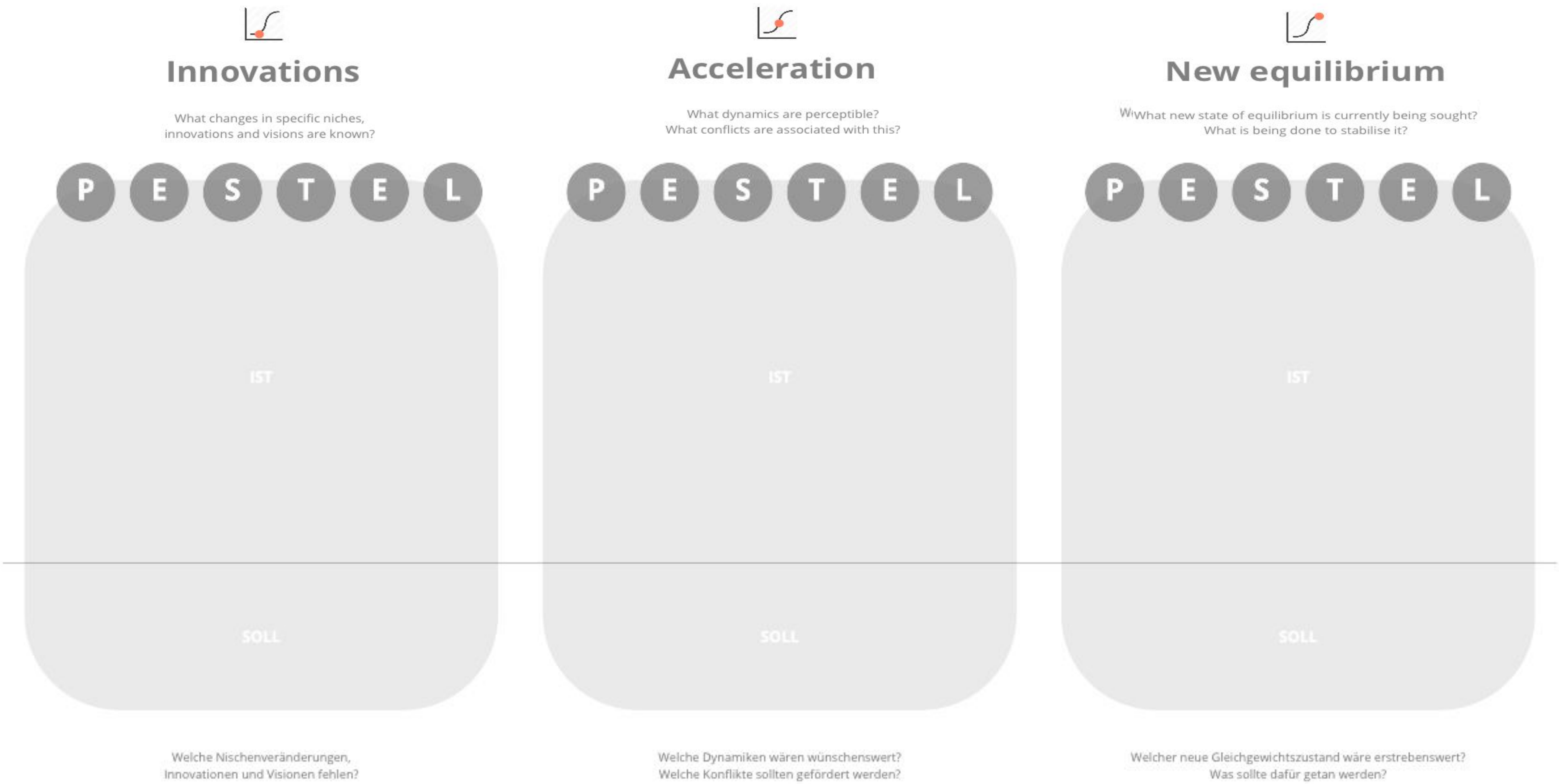
1. Alone or within the group, existing or ongoing system dynamics are sought and discussed. Helpful questions to find out about niche or established trends:
2. Then write down each system dynamic that seems relevant on a post-it and decide whether it should be assigned to the category of "innovations", "acceleration" or "new equilibrium". Then sort them according to their PESTEL affiliation.
3. The resulting picture is checked for plausibility and completeness as far as possible and, if necessary, given a heading to give the existing actual scenario a concrete name.
4. In the next step, we compare the existing picture with our normative objectives:
    - Where should our system develop in general? What stable state of equilibrium should we aim for in the future? Is there a (common) goal?
    - Which system dynamics would be helpful to favour a desirable system state? Which visions or innovations are missing for a desirable development? Which phenomena should be perpetuated, which accelerated, which renewed?
    - Which conflicts are goal-oriented and need to be dealt with, which ones should rather be avoided?

Note: Other important points often emerge in the follow-up. Additions are useful.

System that is being considered:

Illuminate system dynamics

- What path is our system on at the moment?
- Are these innovations, dynamics emerging or already stable, established phenomena? What trends are discernible?
- What conflicts, innovations and stabilisation measures are taking place in the current transformation process?



1.5° Lifestyles, equitable distribution, solidarity, etc.

Fig.: based on FFU, expanded by Paulick-Thiel & Rösler, 2020

Framing the challenge

We have investigated ...

Question or problem / focus of consideration:

We have discovered ...

We wonder ...

Focus

Which transformative challenge should be addressed?

Why is the associated transformation relevant for us and our organisations?

Target groups

Who would be affected by an improvement of the current situation?

Who would benefit from this? Who would not?

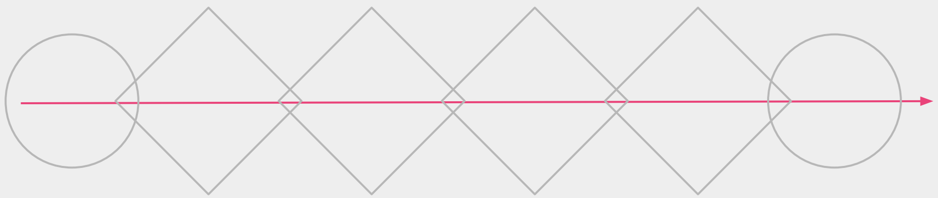
Key question

How can we ...

WHAT to use to design WHAT ... for WHOM?

Rough time frame

Point out the structured process and give the opportunity to understand how decisions can be made in it. Overview of workshops and action phases.



Labelling

Working title:

Date:

Team:

Fig.: Paulick-Thiel & Arlt, 2020

Knowledge Atlas

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
60 - 120 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Creativity - leaving familiar environments and curiously going in search of the unknown

What and what for?
Certainly, in addition to the collected knowledge, new questions and possibly doubts also emerge during the research. During the mapping process, ignorance is not suppressed, but actively addressed in order to point out concrete needs. In this way, knowledge and lack of knowledge can be integrated precisely into the further process.

Added value:
By using this 2x2 matrix we acknowledge that we are moving in a complex environment. The blind spots uncovered form the basis for working on them and using them to solve problems. We see what is most relevant for further development. As a team, we begin not only to talk about similar points but rather rather communicate within the same concepts.

Contextual knowledge:
The known/unknown matrix goes back to the American psychologists J. Luft and H. Ingham. The Johari Window, named after them, is an analytical tool for self-perception and perception of others that has been established since 1955.

Procedure

Before mapping, note the research sources across the process and agree on a common format in the team.

1. Transfer the matrix to a larger work format, e.g. flipchart paper. Write the topic or problem as a starting point for filling the matrix. Each person in the group has a pen and paper or sticky notes.

2. Start in field A and place known knowledge from the research including sources.

3. Collect relevant points in fields B, C, D with impulse questions.
   a. All on their own (approx. 15 min): Write down initial thoughts on the three fields. One aspect per sticky note.
   b. All in turn (approx. 5 min per person): Read out aspects written down for the others and place them in the corresponding fields. Same or similar aspects can be positioned directly next to each other. If necessary, repeat 3.

4. Knowledge stocks are noted in all fields. Now the group can set priorities. What is particularly relevant for solving the problem? The most important points are placed in the middle.

5. Focus on fields C and D. This is where important points are located that will need to be deepened through an investigation in phase 3, with the active participation of key actors. Note which key actors could be interviewed about the contents.

6. Document emergent emphases clearly. Examine in detail the area with the most emphasis.

Validated references

What is known to us and
known to others?

Necessary field research

What is unknown to us,
but known to others?

A

C

Known knowledge
Developed knowledge

Unknown knowledge
Accessible knowledge

Topic:

Known ignorance
Specific knowledge

Unknown ignorance
Blind Spot

B

D

What is known to us,
but unknown to others?

Appropriate transfer

What is unknown to us and
also unknown to others?

Key factor for transformation

Fig.: based on Luft & Ingham, modified by Paulick-Thiel & Arlt, 2020

Identify actors

Identify the actors who are important for dealing with your *transformative challenge* or who enable or hinder desirable developments in this context.

Innovations

What changes in specific niches, innovations and visions are known?

Acceleration

What dynamics are perceptible?
What conflicts are associated with this?

New equilibrium

What new state of equilibrium is currently being sought?
What is being done to stabilise it?

verhindernd

Who enables or hinders desirable niche changes?

Who enables or hinders desirable dynamics or confrontations?

Who enables or hinders the new desirable state of equilibrium?

ermöglichend

IST

SOLL

Guiding question / transformative challenge: ____________________

Fig.: based on FFU, extended by Paulick-Thiel & Arlt, 2021

Transformative actor analysis

Materials
Identify material from *actors*, pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
30-50 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Self-reflection - developing realistic expectations of whether and how intensively transformations can be influenced
Empathy - seeing and wanting to take other perspectives

What and what for?
Social transformation processes aim not only to improve existing systems, but to change them significantly. People have different roles, concerns and interests in these far-reaching processes of change.

Added value:
The distinction between regime actors, niche actors and change agents clarifies the influence of the respective person or group of persons on transformative development. Based on this, their respective motives and dilemmas can be assessed in order to make better human-centred decisions in relation to societal transformations.

Contextual knowledge:
Actor maps are a basic tool of participatory processes. They represent a central starting point for the participation of different perspectives in order to implement legitimate decisions and effective measures. Mapping should always be understood as a snapshot, as the constellation of actors is constantly changing.

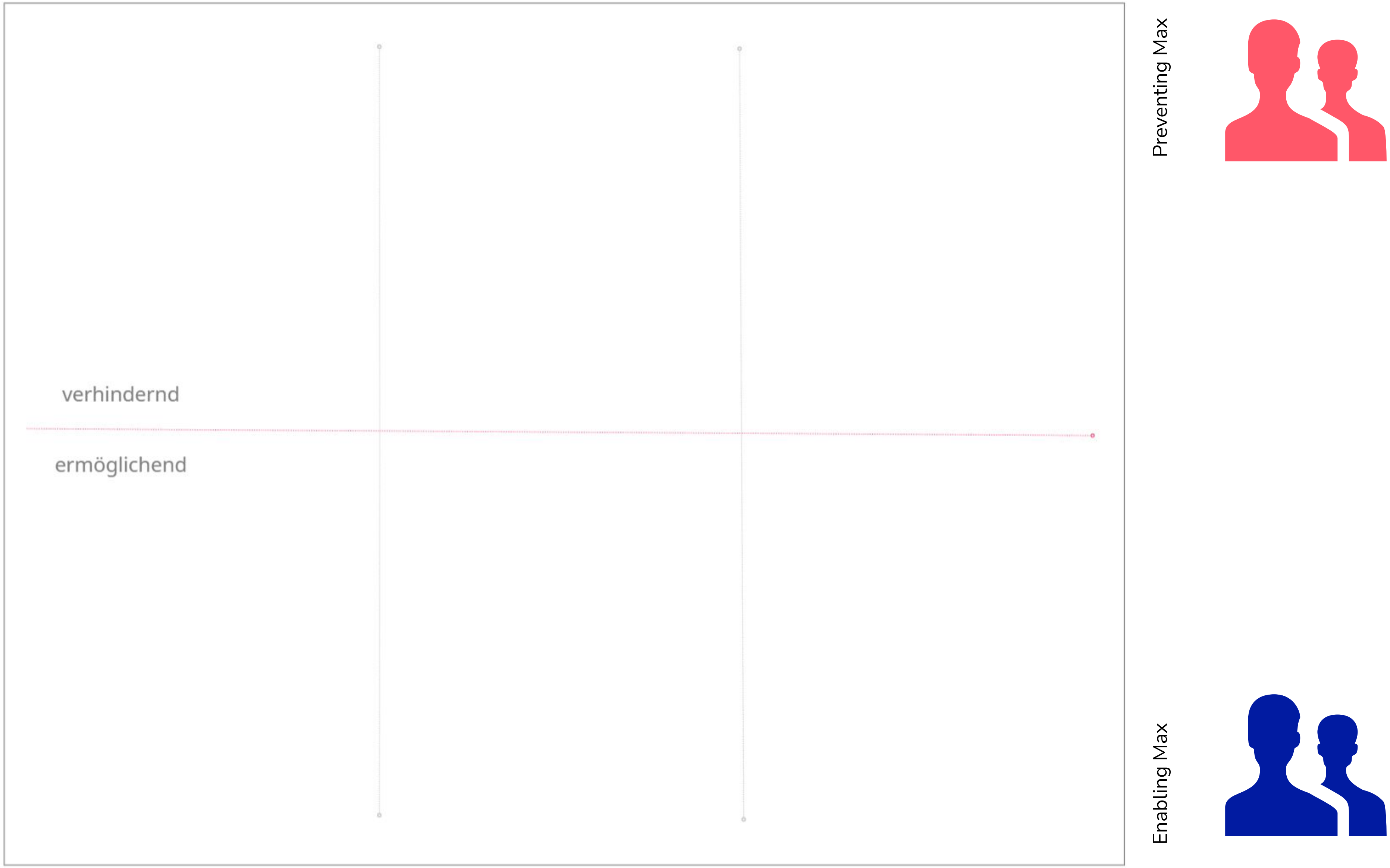
Procedure

1. Have material from *actors* ready.
2. Introduce the actors in the group and find the best position together. The more neutral the influence on the transformative challenge, the closer the actor moves to the centre.
3. Differentiate actors with reference to the design of transformations. Discuss together which sticky notes from the previous matrix can be assigned to the three different types of actors.
   a. Which of the actors, enablers and preventers, can be located in the regime or the niche?
      Regime actors work in established structures and are part of the "mainstream", e.g. market-leading companies
      Niche actors work in marginal structures and form alternatives to the "mainstream", e.g. the degrowth movement
   b. In addition, are there other actors who can be described more as change agents or promotor:in?
      Change agents are drivers of change processes that go beyond their institutionalised sphere of influence, e.g. procurers of a municipality aiming for 100% renewable energies.
      Promoters are active and intensive supporters of innovation processes, e.g. committed citizens or in-house activists.

1. Prioritise selection through visual matching.

Differentiate and categorise actors with reference to the type of influence on transformations

Transformative actor analysis



Regimeakteure
arbeiten in etablierten Strukturen und sind Teil des „Mainstreams"

Nischenakteure
arbeiten in Randstrukturen und bilden Alternativen zum „Mainstream"

Change Agents & Promotor:innen
sind Treiber:innen und Unter-stützer:innen von Wandelprozessen

Fig.: Paulick-Thiel & Rösler, 2020

Actor understanding

Materials
Material from *Transformative Actor Analysis*, pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template or virtual whiteboard

Time frame:
30-50 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Empathy - seeing and wanting to take other perspectives
Collaboration - stimulating the interaction of different actors and using their diversity of perspectives

What and what for?
The connections between tangible events and acting persons are relevant to better understand: Why is what we experience the way it is? How can we influence it to be different? Empathising with pro and contra perspectives makes it possible to respond to resistance and to train how to deal with conflict as part of transformation processes. Looking at each other's interaction, makes their behaviours more understandable.

Added value:
Actors unconsciously or consciously influence the situation due to their different roles and interests. By recognising their perspective as a valuable body of knowledge, they can be involved in the process. Their perspective inspires the design of valuable approaches to solutions.

Contextual knowledge:
Actor-network theory is a social science method that helps to better understand processes in society. In this method, the interconnectedness between actors is of central importance, as individual actors never exist in a vacuum and their actions are mostly shaped by the connections to other actors.

Procedure

1. Transfer selected actors from the previous analysis: contra-perspective = preventing actors and pro-perspectives = enabling actors in relation to transformative challenge.
2. Use visual voting to identify the most interesting contra and pro actors in the group and carry out the following steps for these two actors as examples:
3. Consider together which insights from the reflection on the opposition talks are useful for a better understanding of the selected actors. For this, reflect on actors on the right side:
   a. What are their motivations to prevent or enable something?
   b. What are their interests, where do they block, what could they get if they would be involved in?
4. Clarify the connections to other actors and reflect on (emotional) connections:
   a. What could be considered as common goals?
   b. What conflicts are known between the actors?
5. Select together through visual coordination which aspects should be examined in more detail in the further course, e.g. in a discussion with a counter-actor. What common interests, resistance or room for manoeuvre can be identified?
6. Make the selection clear and, if necessary, reformulate it so that it can be used for further work.

Key issues : ____

Actor understanding

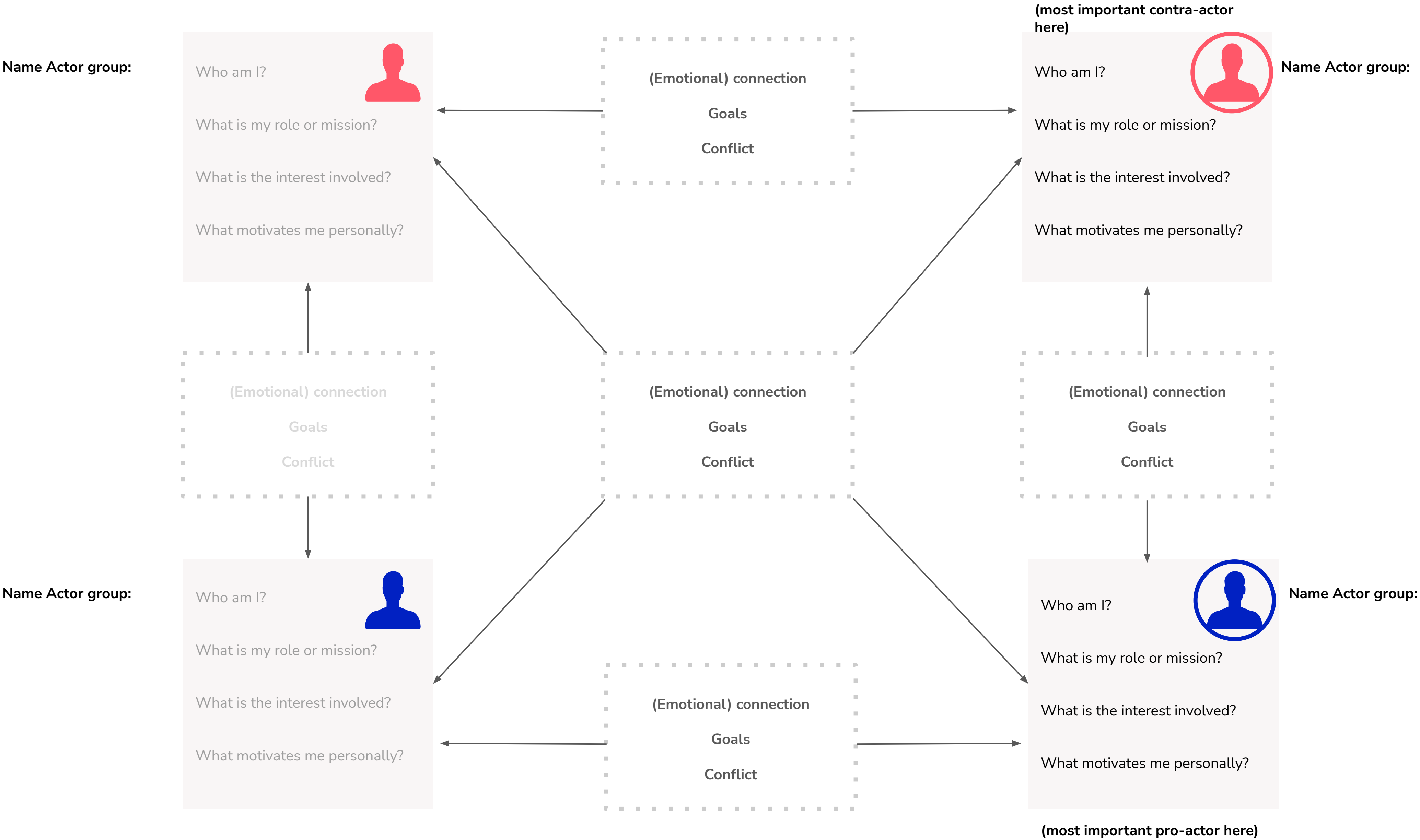


Fig.: based on Dark Horse, modified by Paulick-Thiel & Arlt, 2020

Clarify assumptions

Materials
Material from *Actor Understanding*, pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
40 - 120 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Iteration - welcoming complexity and resistance

What and what for?
The method *Clarifying Assumptions* supports in identifying and explicitly formulating underlying assumptions. Conscious and unconscious biases can be made transparent in relation to the problem. Existing prejudices that are rarely talked about are made usable and help to consciously question assumptions in the further course.

Added value:
The assumptions can be sensitively and precisely verified in contact with key actors. They are the basis for later observations or a conversation guide.

Contextual knowledge:
The way we reach conclusions is rarely purely fact-based. Nobel laureate D. Kahneman identifies two strategies for dealing with the modern world: fast thinking, which is constantly active, making quick and automatic judgements, and slow thinking, which is exhausting, consumes energy and only switches on when fast thinking encounters the complex or unexpected. Naming assumptions explicitly is important to become aware of the biases of fast thinking.

Procedure

1. Transfer template. Take over aspects from *Actor Understanding* and add to them if necessary.

2. Discuss inclinations. This could be anecdotal evidence, individual beliefs or anchor information that has shaped the course of all further thinking on the topic. Reflect on what biases exist towards the pro and con perspectives. Write down one aspect per sticky note and locate it on the right hand side above and below the triangle.

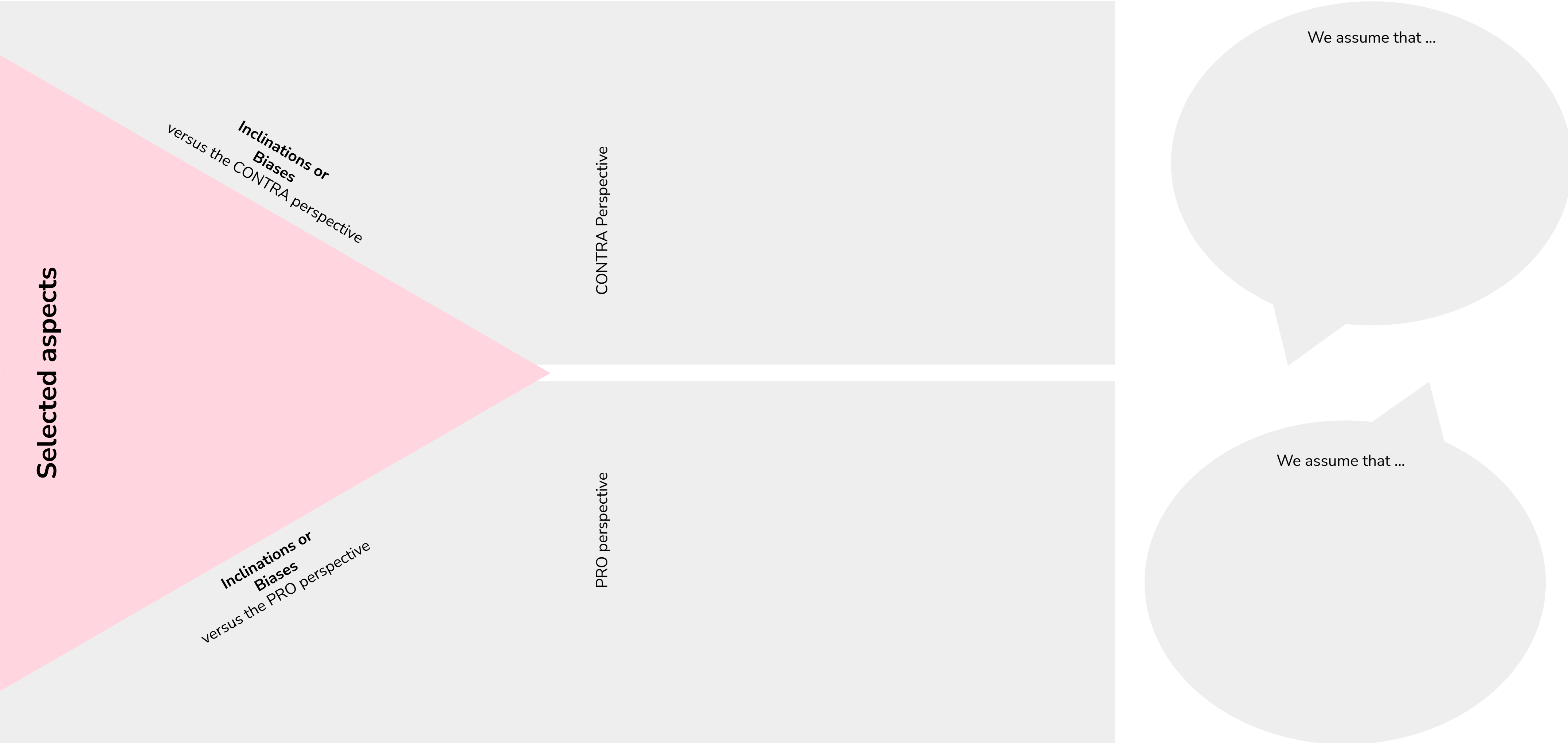
3. Identify assumptions. Organise and condense written down aspects thematically. Identify three relevant assumptions per perspective that can be explored in exchange with the actors. Which hypotheses can be refuted, confirmed or explored in more detail in a conversation or observation? Prioritise selection through visual voting.

4. Compile the main points for the interview guide. Formulate the most important assumptions concretely and as complete sentences. Intermediate results are later included in the interview guide.

   Note: Other important points often come up after the meeting. Additions are useful.

Suggestions: Put on the "assumption glasses" in everyday work, distinguish everyday statements into facts and assumptions and work with them.

Clarify assumptions



Discuss inclinations. These could be anecdotes or individual beliefs that shape views of actors. Write down one aspect per sticky note and locate it on the corresponding page.

Identify assumptions. Discuss, write down, thematically organise and condense. Identify three relevant assumptions per perspective that can be explored in exchange with the actors. Which hypotheses can be refuted, confirmed or explored in more detail in a conversation or observation? Mark selection.

Put together a selection for an interview guide. Formulate the most important assumptions concretely and as complete sentences. Intermediate results are later included in the interview guide.

Fig. based on Lab@OPM/GSA, 2018; modified by Paulick-Thiel & Rösler, 2020

Set aside prejudices

How we can shed prejudices

In complex situations, our brain unconsciously falls back on familiar thought patterns. These habits prevent us from being overwhelmed and enable us to orientate ourselves in the flood of information. However, this procedure often leads to erroneous conclusions and cognitive distortions. Based on the **"Cognitive Bias Codex",** the most important cognitive biases are here named and as well as tips to avoid it.

!!! Thinking error
→ Way out or solution

Information bias

!!! We collect more and more information, even if it has no influence on our actions.
→ People can often make better predictions or decisions with less information.

Sunk cost effect

!!! The more time, money or energy we have already invested in a project, the more we stick to it - even if it is hopeless.
→ Instead of the past, use an assessment of the future more as a basis for decision-making.

Loss aversion

!!! We react more strongly to losses than to gains. That is why we usually judge short-term costs higher than sustainable benefits.
→ Weigh up in which long-term impact to invest from now on.

Optimism bias

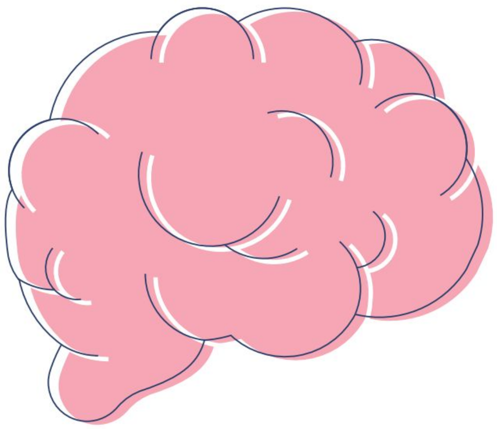
!!! We assume that we face lower risks than others. Other people are more at risk of epidemics than we are.
→ Optimism in all honour, but remaining realistic is sensible. We are just as affected by environmentally harmful influences and probabilities as others.

Stereotype trap

!!! We have a very convinced opinion about many things without ever trying them ourselves.
→ Change thrives on letting go: start with your own prejudices, test new things and only then form an opinion.

Authority trap

!!! In the presence of an authority, we switch our independent thinking down.
→ Question theses and use data critically. Even experts can be wrong and biased.



Confirmation heuristic

!!! We are tempted to interpret information to fit our beliefs.
→ Investigate contradictions specifically instead of defending existing opinions or wanting to confirm them per se.

Subsequent errors of reasoning

!!! When we have made a choice, we ignore or downplay the disadvantages of our decision. At the same time, we emphasise the disadvantages of alternatives.
→ Recognise wrong decisions, stand by them and revise or adapt them.

Traveller effect

!!! Forecasts, supposed majorities or charismatic people influence the formation of one's own opinion.
→ Think for yourself, don't sit it out. Weigh up the pros and cons in order to put forward your own position.

Fig.: The Cognitive Bias Codex, designed by Manoogian, text: Niebert, Geuchen 2018, Movum: Natur und Weltanschauung, Gutwetter Verlag, pp.5; modified Paulick-Thiel, 2020

Develop interview guidelines

Materials:
Material from *Clarify assumptions*, pens, paper, sticky notes

Time frame:
30-45 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Empathy - seeing and wanting to take other perspectives
Creativity - leaving familiar environments and curiously going in search of the unknown.

What and what for?
In contrast to a quantitative survey, the planned interview does not follow a rigid sequence of questions. It is not about measuring, but about understanding the interlocutors. The use of open and in-depth questions forms the basis for a semi-structured interview. The interview guide can and should be adapted to the situation. This gives us the flexibility to let our counterpart report freely the dynamics he observed in the environment and to ask specific questions about interesting aspects.

Added value:
In addition to the pre-defined topic areas, the guide leaves enough room for new aspects of content that arise during the interview. We thus remain open to new discoveries, but do not lose sight of what we want to find out. This succeeds better and better with each conversation that is conducted.

Contextual knowledge:
The quality of the relationship that is built up before and during the interview significantly determines the depth of the interview data. In addition to the collection of data, the interaction with the interlocutors is prepared.

Procedure

1. Transfer template to start with contra-actors and write down who should be interviewed as examples.

2. *Clarify* results from *assumptions* and provide knowledge atlas. Transfer relevant aspects to the structural level and adapt if necessary.

3. Using the bullet points and examples along the arc of tension, develop simple and open questions allowing unique and surprising answers.
   a. General questions deal with thoughts and positions on the topic or the dynamics in the system.
   b. Experience questions focus on positive, negative and surprising experiences.
   c. Follow-up questions make it possible to specifically address a question about an experience and to learn more about particular aspects or even contradictions in it.
   d. Desired questions round off the conversation. The wish scenarios described often provide information about further goals.
   e. Conclude by asking for our own summary of the most important aspects of sustainability transformations.

4. What questions can be used to examine the assumptions more closely? The aim is to find out the deeper reasons for the positions of the other person regarding social transformation processes and to go deeper in a benevolent but curious way. For the challenge in question, write down questions for each category.

   Note: Different discussion guides can be created for pro and con positions. It may be worthwhile to adapt the guide within the stakeholder group.

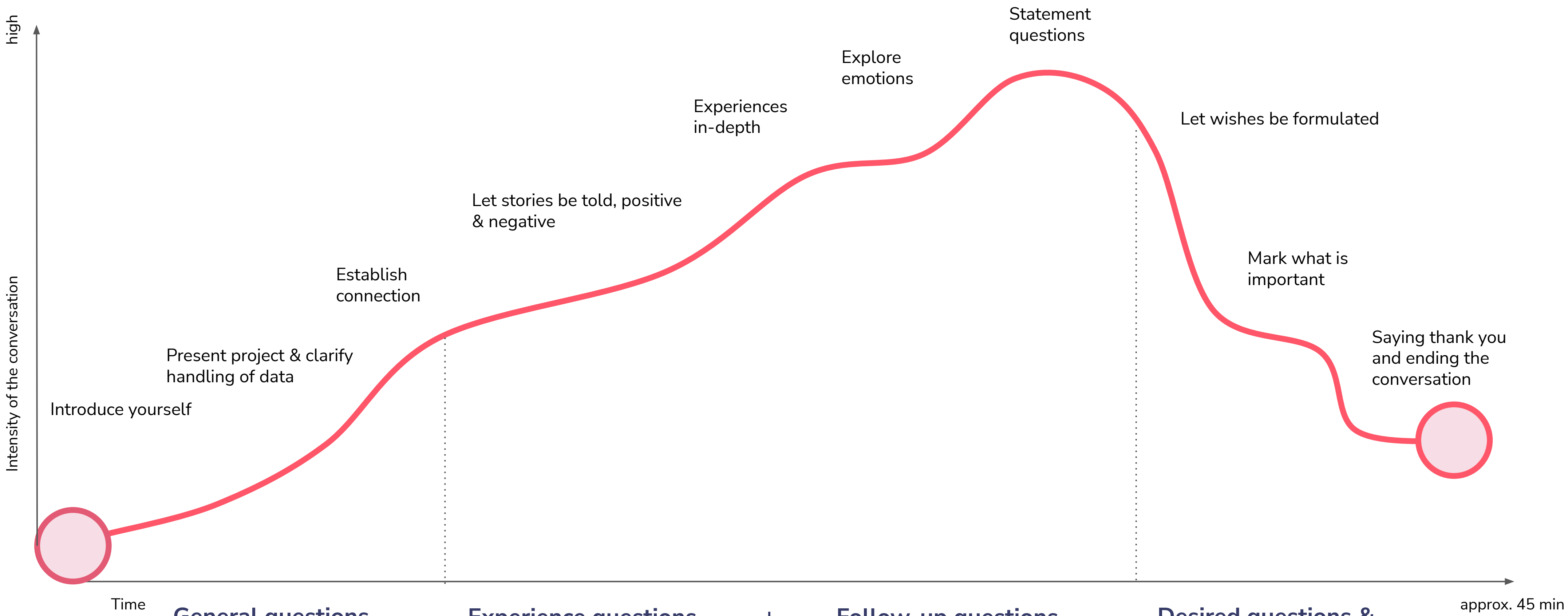
Develop interview guidelines

Structure level

Which thematic areas or assumptions are we dealing with?

What is the aim of our investigation?

What are we trying to understand with this conversation?



General questions

Positioning on the topic

e.g. "What do you associate with ...? Why?" or "What does ... mean to you? Why?"

Experience questions +

Positive / Negative experiences

e.g. "Tell me about your experience with ... .", "What was your best/worst experience with ...? Why?", "What was surprising for you with regard to ...? Why?"

Follow-up questions

Un/conscious attitude

e.g. "Can you describe to me in more detail in connection with ...?", "What has changed for you over time? Why?", "How did it make you feel? Why?"

Desired questions & conclusion

Wishes, goals, visions

e.g. "If you had magic powers, what would you like to change ...? Why?", "What is especially important to you? Why...?"

Fig.: based on ideo / Lab@OPM, adapted by Paulick-Thiel, 2020

Prepare the basis for a discussion

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster

Time frame:
30-45 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Empathy - seeing and wanting to take other perspectives
Iteration - welcoming complexity and resistance

What and for what?
In order to conduct conversations with key actors skilfully, a dress rehearsal should be carried out with the conversation guide. This rehearsal should simulate the conversation situation with a key actor. In this way, we can see whether our guide asks the right questions and whether our conversation guidance works within the setting.

Added value:
Before the interviews, we can experience the interview situation ourselves. The rehearsal sharpens our perception and allows for adjustments to the guide. Once we have gone through the interview situation ourselves, we are ready to engage with the actual person to be met.

Contextual knowledge:
Clarify data handling. All external participants must officially give their consent to the recording of conversations and be given the opportunity to withdraw it. Depending on the procedure, different data protection requirements must be observed. The most important aspects should be summarised on a consent form, which may also take internal regulations into account.

Procedure

1. Form a test group of three people. Define roles. Two people form a tandem to lead the discussion with questioner and recorder. One person puts him/herself in the place of a potential key player.
    a. The questioner uses the interview guide and interview tips from the template. Unlike a technical discussion, where two experts talk about a topic, this person acts like a reporter. Apply conversation tips. Use authentic interest to help put the other person's perspective into words.
    b. Recorder:in uses a transcript template to note down important information, if possible in quotations, and records impressions of the environment in a collection sheet.
    c. Potential key player answers the questions asked as best as possible.

2. Look for an environment that is close to the real conversation situation. Perceive the situation and environment with all your senses. Note down important impressions.

3. Carry out a test run. Afterwards, use the method of documenting the conversation for an initial evaluation.

4. Reflect on the test as a team: How did it feel? Was it a pleasant atmosphere for the interview? Did the questions and the procedure work? If necessary, adapt the interview guide and the scheduled times.

Note: The template can be used in different depths for beginners:inside & advanced users.

Talking tips

Engaging with new perspectives. Before we start the conversations, we curiously tune into the moment:

- Our counterpart is expert on their own experience. We meet the person to listen, understand and learn from them.
- During the interview, the proportion of speech should be 80/20 in favour of the interviewee.
- We do not interrupt the interviewees and hold out pauses to offer them the space for further thoughts.
- The statements of our interlocutors are correct from their perspective. There are no wrong answers.
- We mute calls and text messages and are focused and open to the stories and perspectives of our counterpart.

Be flexible. We can deviate from the interview guide or change the order of the questions if this benefits the investigation.

Asking: why, wherefore, for what? If our counterpart uses non-specific or ambiguous words, it is worth asking directly: "Why do you say that?" or "What does 'good' mean to you?". If we do this several times and build on the answers, causes become visible.

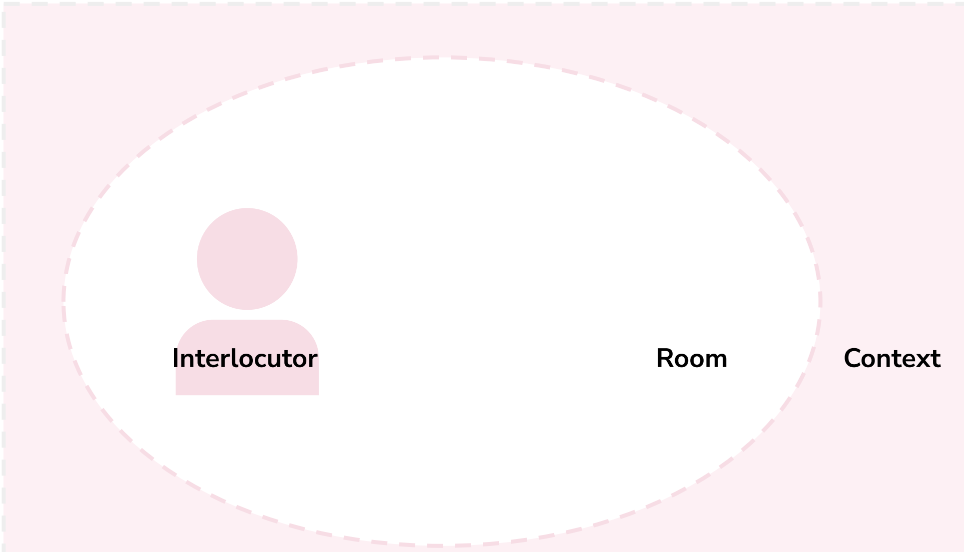
Sensing when to steer. There are different directions in which the conversation can develop. Our task is to keep the focus in the conversation and to guide our counterpart back to the topic if the conversation digresses.

Know when enough is enough. It takes time to build up a relationship in a conversation. However, experience shows that the attention decreases after 45 minutes. With particularly interesting and open interlocutors, it is worth arranging a follow-up appointment or asking for interest in participating in workshops.

Transcript template

General questions Positioning on the topic	**Experience questions** Positive/negative experiences	**Follow-up questions** (Un)conscious attitude	**Requested questions** Wishes, goals, visions

Collection sheet for environmental impressions



Sharpen your senses briefly before the conversation:
Cover your eyes and only hear, cover your ears and only see.

Fig. Paulick-Thiel & Arlt, 2020

Document conversations

Materials:
Per conversation: guidelines, paper and pen for taking notes, recording device if necessary, camera for documenting

Time frame:
30-45 minutes

Roles:
Talking points
Logging
Observation

Basic attitude:
Empathy - seeing other perspectives
Iteration - welcoming complexity and resistance

What and what for?
The interview documentation is a transcript based on original quotes and observations. On this basis, a joint evaluation can be made afterwards, which, in addition to the contents of the conversation, also includes body language and interactions with the environment.

Added value:
By documenting the situation before, during and after the conversation, we can discover aspects that are often overlooked. Information that seems unimportant gains relevance when it can be seen in context. In addition, experience shows that visualisations are always enriching!

Contextual knowledge:
In terms of conversation, succinct combinations of statement, body language and tone of voice are particularly interesting. Investigations in the actual context are remarkably effective as they provide opportunities for observation that make even the most controversial and complex issues easier to understand.

Procedure

1. Work as a tandem before, during and after the interview. Prepare a folder or binder with all the necessary materials for each interview.
2. Use the way to the conversation to sensitise yourself and perceive the place of the event with all your senses. Note down impressions of the surroundings.
3. Define roles per conversation: one person leads the conversation and asks questions, the other person notes down what is said, if possible in original quotes, and records impressions.
4. Start the conversation with a short introduction and explain the roles to the other person. Remember the consent form or recording, point out anonymisation. Establish openness.
5. During the conversation as a tandem, pay attention to body language, facial expressions, tone of voice and choice of words. Deep thoughts and attitudes, as well as emotions and needs, can only be deduced through careful observation.
6. Questioner:in gives the person taking the minutes the opportunity to introduce short questions of understanding between the sections of the conversation.
7. Immediately afterwards, fill in the template together. Now the experience is most present. The person who took notes shares their impressions while questioner:fills in the template.

Interlocutor abbreviation:
Date:
Place:

Key set:

Document conversations

	General questions	Experience questions	Follow-up questions	Requested questions
	Positioning on the topic	Positive / Negative experiences	Un/conscious attitude	Wishes, goals, visions
What did we expect? Our assumptions				
What did we learn? Note in quotations				
What have we observed? Draw the course of the conversation as a line: e.g. open-mindedness upwards and reservedness downwards. Describe briefly.				
What surprised us or was contradictory? Our "wow" moments. Also include environmental impressions (person, space, surroundings)				
What do we learn or conclude from this? Our "aha" moments. Also include environmental impressions (person, space, surroundings)				

Fig.: inspired by Lab@OPM 2018, adapted by Paulick-Thiel & Köbler, 2020

Individual Interview evaluation

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster

Time frame:
90-120 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Collaboration - using diversity of perspectives
Empathy - seeing and wanting to take other perspectives

What and what for?
Analysing information is teamwork and aims to make the wealth of existing qualitative data manageable and processable. Key aspects are worked out per individual interview.

Added value:
The framework in which the content from the conversations flow, is flexibly adaptable. All team members are invited to fill it in so that not only the obvious is described, but also the underlying is recognised.

Contextual knowledge:
Instead of proving preconceived hypotheses, the reality of the key actors is examined. This is important to develop a solution that is relevant in their reality and contributes to the desired change. The practice in the field of so-called synthesis is constantly evolving and there are countless ways to report on the experiences of key actors and interpret them together.

Procedure

1. Have all the information from a conversation ready. Write down one quote or one aspect per sticky note. Select key statements and observations that seem particularly surprising, emotional or contradictory What were particularly positive or negative perceptions?
   a. What motivates or hinders?
   b. What conflicts or dependencies exist?
   c. What are interests and goals?
   d. What are fears or factors that limit behaviour?
2. For each individual interview, transfer the template in large print. Briefly and succinctly tell what is written on the sticky notes. Intuitively place the sticky notes in one of the four fields outside the circle.
3. Once all the sticky notes have been collected, look for patterns. Discuss in the team which slips of paper belong together and group similar aspects in the corresponding fields. Condense individual slips of paper into areas where the contents of the slips of paper are related to each other.
4. Summarise the contents of the intersections in your own words and write them down on new sticky notes. These own formulations are our findings. Stick these notes in the central circle.
5. Document everything and have the key findings summarised by someone who was not present at the meeting. With this simple quality assurance, the interviewees can assess whether all the aspects that came up in the conversation have been covered.

Note: The template is usable for beginners:inside & advanced in different depths

Interlocutor:
Anonymous marking:

Individual interview evaluation

Transformation readiness
(no) motivation
What does our interlocutor (not) want?

Need for transformation
(no) legitimacy
What should our interlocutor (not) do?

Insights from the individual interview

What can our interlocutor (not) do?
(none) Skills
Transformation capacities

What is our interlocutor (not) allowed to do?
(none) Opportunity
Transformation framework

Fig.: Paulick & Arlt, 2020

"How might we ..." Question

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster

Time frame:
15 minutes

Roles:
Moderation
Documentation
Time management

Basic posture
Creativity - leaving familiar environments and curiously going in search of the unknown
Iteration - welcoming complexity and resistance

What and for what?
"How might we ..." questions bundle gained insights by combining desirable states and preventing factors in an open question in a meaningful way. With their simple and flexible structure, they point in the direction of possible solutions without prescribing them.

Added value:
HMW questions strengthen individual and collective problem-solving skills. Their challenging character stimulates the development of multiple ideas that target a common goal and are less obvious.

Contextual knowledge:
"How might we..." questions can be understood as a solution-oriented mindset. This sentence beginning enables challenges to be named constructively and worked on with a focus on the matter at hand. They are mostly applied to formulate a directional problem hypothesis. However, they can be used at different points in the innovation process. For example, as a leading question before contact is made with key actors or as a provocation to develop particularly crazy ideas.

Procedure

1. Transfer template large. Have all previous findings ready.
2. Select a desirable state and hang it in the middle column. Write down the associated actors or groups of actors on sticky notes in the left column.
3. Next to the selected desirable state, assign various hindering factors in the right-hand column and try out which combinations are exciting. What belongs together? Proceed according to the trial & error principle. "How can we enable WHOM, to do WHAT, WITHOUT ..." " several times out loud and adapt it so that it becomes a rounded question. Only then write it down.
   a. Check: Does the question already contain a specific solution? Is the question too abstract and without direction? If yes, then look for new combinations.
4. Repeat steps 2 and 3 several times at your own discretion. Document all reasonable variants and look at and refine them again with some distance. Elements that cannot be combined can be included later in the process, e.g. in brainstorming.

Joker: If a useful principle has been identified in advance, the variant "How can we enable WHOM to do WHAT, INDEM ..." can be applied.

Note: Establish traceability by showing on which original data the questions are based.

"How might we ..." Question

How can we enable **WHOM** to do **WHAT WITHOUT**?

Key player

Desirable condition

Preventing factor

Consumers: inside in society	*Ex: Packaging-neutral shopping is common and simply regulated*	*Ex: Packaging regulations favour portioning and convenient purchase*
WHO	***WHAT***	***WITHOUT***

How might we

Enable *consumers to shop with little packaging as a matter of course,* ***without*** *disregarding the regulations governing sales?*

Enable *consumers to choose reusable packaging* ***without*** *making the shopping experience complicated and stressful?*

Enable *consumers to reduce their packaging waste in everyday life* ***without*** *making portions too large and shopping inconvenient?*

Wildcard question: How can we

Enable *consumers to reduce their everyday packaging waste* ***by*** *understanding and using the point of purchase as a "packaging transaction zone"?*

How might we

?

?

Fig.: based on Dark Horse, 2018; modified by Paulick-Thiel & Köbler & Arlt, 2020

Impact staircase with impact assessment

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
30-45 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Reflect self-critically on one's own role in accompanying transformation processes and develop realistic expectations as to whether and how intensively transformations can be influenced.

What and what for?
The impact staircase supports a thinking approach that starts in the future and leads into the present. The long-term impact goals (impact) provide orientation to strategically link the achievement of medium-term results (outcome) with the implementation of planned services and measures (output). The functioning of a project is clearly illustrated and put in relation to the necessary effort (input).

Added value:
The long-term projection into the future makes it easy to describe dependencies between the effect and the immediate benefit of a solution. The inclusion of unintended consequences prevents one-dimensionality.

Contextual knowledge:
Impact logics are a proven tool for assessing and evaluating the quality and cost-effectiveness of planned interventions. All impact dimensions are relevant in order to better understand the relationships between intervention, results, impacts and consequences.

Procedure

1. Transfer the right side of the template in large size, e.g. into a miro or an easyretro. Enter the *HMW question* or title. Read through the seven state descriptions on the left side beforehand.
2. First edit the Target States column. Start in field 1. Read the state description aloud. Which target state can our solution bring about? In silent work, write down characteristic aspects by which the state could be recognised. One aspect per sticky note.
3. Briefly present the aspects written down one after the other and attach sticky notes accordingly. The same or similar aspects can be grouped directly.
4. Repeat steps 2. and 3. for the other six fields.
5. Finally, discuss the contents in all fields together and work out and note down the core aspects per field.
6. Switch to the second column. Derive possible consequences for each target state: If the target state is reached, what positive and negative consequences can be assumed? Write them down and hang them up.
7. Finally, consider which activities are necessary to achieve the target states and how negative consequences can be reduced. Document intermediate results well.

Addition: Divide offers & measures into smallest units of action and try out in everyday work how minimal changes have an effect.

How-can-we-ask or transformative challenge: ____

Impact staircase with impact assessment

	State descriptions	Target states	Possible consequences
Future	1. There are desired sustainable transformations for a whole organisation, region, sector, society ...	1. condition can be recognised by:	Positive Negative
	2. The living situation of the groups of actors reached was changed in a desirable way (socially, economically, ecologically, etc.).	2. condition can be recognised by:	Positive Negative
Effects	3. Sustainable changes in actions and habits of the groups of actors reached can be demonstrated	3. condition can be recognised by:	Positive Negative
	4. The groups of actors reached have new knowledge or skills, have consolidated/changed their attitudes, formed an opinion	4. condition can be recognised by:	Positive Negative
Results	5. The groups of actors reached accept offers/measures and are satisfied with them (pleased)	5. condition can be recognised by:	Positive Negative
	6. The groups of actors to be reached take up offers/measures to the desired extent	6. condition can be recognised by:	Positive Negative
Present	7. The services and measures are implemented on time, on budget, in exchange with the stakeholder groups (function, operability are guaranteed, etc.).	7. condition can be recognised by:	Positive Negative

Fig.: based on Univation (originator) and PHINEO gAG (further development), modified by Paulick-Thiel, 2020

Vision Statement

We are [what], so that [why]

Jede*r in der Bundesverwaltung ist in der Lage zu...

Wir möchten eine Bundesverwaltung, in der X für Y möglich ist.

Wir garantieren, dass für X immer Y möglich ist, so dass wir in einer Welt leben, in der Z selbstverständlich ist.

Eines Tages werden alle X in der Lage sein, zu Y, so dass Z selbstverständlich ist

Fig.: Paulick-Thiel, Balaz, 2021

We are (what), so that (why).
Everyone in the federal administration is able to...
We want a federal administration where X is possible for Y.
We guarantee that Y is always possible for X, so that we live in a world where Z is obvious.
One day all X will be in the position to Y, so that Z is the new statu quo.

Fig.: Paulick-Thiel, Balaz, 2021

Identify leverage points

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
30-45 minutes

Roles:
Moderation,
Documentation,
Time management

Basic attitude:
Self-reflection - Reflecting self-critically on one's own role and developing realistic expectations as to whether and how intensively transformations can be influenced.

What and what for?
Leverage points are intervention points to change systems in a focused way. If they are recognised and moved, enormous effects can be achieved. They make it possible to look at a system from the outside, so to speak, and through close observation to find levers in the system that change it significantly.

Added value:
If you struggle with symptoms but ignore their causes, you waste energy and time. Identifying and using powerful leverage points helps to solve complex problems effectively while using resources efficiently.

Contextual knowledge:
The inverse of the Archimedean point means that a system needs a push "from outside" to get moving. The "Places to Intervene in a System", also known colloquially as "Leverage Points", were formulated by Donella Meadows in 1977 and are among the best-known models of systems theory.

Procedure

1. Transfer template. Have the material ready. Write down the how-can-we question or problem at the top left. Transfer desired long-term state from the *impact staircase* or *vision statement.*

2. First work individually and silently (5 min). Make a personal selection from the six leverage points shown and choose one to three leverage points where the first thoughts spontaneously arise. For each selected leverage point, proceed as follows: Read the impulse question and answer it from your own perspective with a view to the desirable effect. Write down each thought individually on sticky notes and briefly explain why. Collect in front of you.

3. Work together in the group on the 6 lever points from the bottom to the top (5 min per line). Start in line 1. Introduce Post-Its in turn and locate them in the line. Link similar thoughts. Decide together which 1-3 aspects are particularly relevant with regard to the desirable state. Mark the group decision.

4. Repeat the procedure for the next five leverage points. If a leverage point has not been thought of by anyone in the group in the silent work, discuss together and note down the group thoughts on the corresponding impulse question. Select 1-3 particularly relevant aspects and mark group decision.

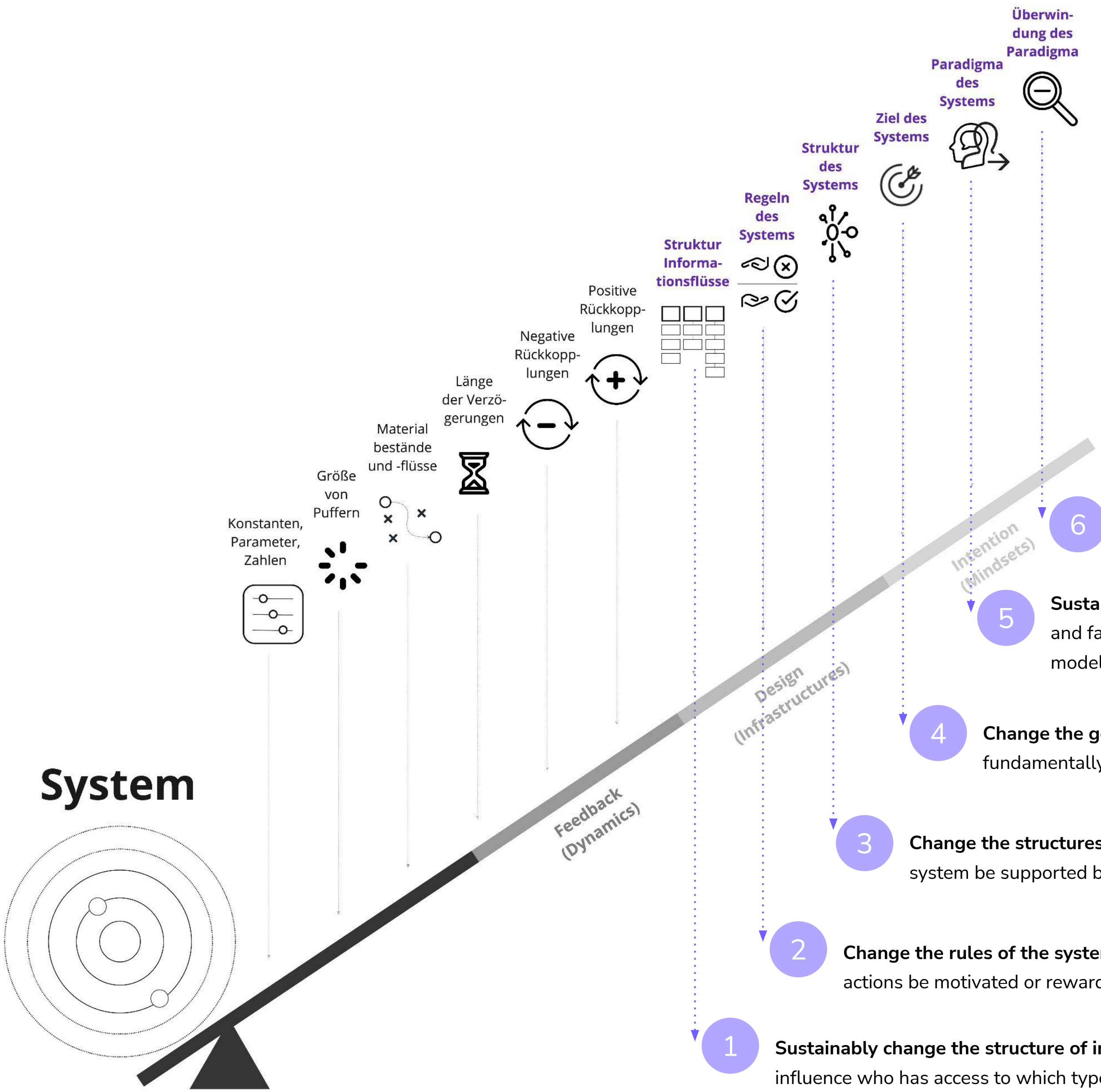
5. Finally, decide together which point(s) of leverage seem(s) most relevant and should be further developed in the *creative cartwheel.* Mark the selection and, if necessary, formulate it again clearly on a post-it.

How-can-we-ask-questions or pose problems

(write down before starting the silent work)

Identify leverage points

Desirable state
of a system XYZ:



6 **Learning the art of overcoming paradigms:** How can the values and priorities that lead to unsustainable assumptions and behaviours be changed or sustainable value sets become diverse and combinable?

5 **Sustainably change the social mindset from which the system emerges:** How can anomalies and failures in the current paradigm be repeatedly and consistently pointed out and mental models for sustainable transformations be strengthened?

4 **Change the goal of the system in a sustainable way:** How can a fundamentally sustainable orientation of the system be driven and fostered?

3 **Change the structures of the system in a sustainable way:** How can the self-organisation in the system be supported by adding, omitting, collaging structural elements?

2 **Change the rules of the system in a sustainable way:** How can sustainable actions be motivated or rewarded, or restricted or punished?

1 **Sustainably change the structure of information flows:** How can we influence who has access to which types of information?

Fig.: based on Meadows, adapted by Paulick-Thiel & Arlt, 2021

Creative cartwheel

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template, WKW question

Time frame:
20 - 30 minutes

Roles:
Moderation, Documentation, Time management

Basic posture
Creativity - leaving familiar environments and curiously going in search of the unknown
Iteration - welcoming complexity and resistance

What & What For?
Creative cartwheeling involves alternating positive and negative thinking. The method is based on the principle of collective authorship. By always referring to the ideas of other team members, a set of ideas is created that no one person could have thought up alone.

Added value
When an idea is passed from person to person, it can grow and change in unexpected ways. By alternately stretching one's imagination through exuberant approval and devastating criticism, amazing and original solutions emerge. Even when the individual ideas seem comical or impossible, the core often contains conceptual signposts that lead into a promising direction.

Contextual knowledge
The creative cartwheel has references to the headstand method and Edward de Bono's provocation technique, which exists in many variations. Mental provocations throw habitual thinking out of its well-worn tracks and activate less-used synapses in the brain.

Procedure

1. Form teams of max. five people, standing or sitting around a table. Print out the template for each person or transfer it to an A4 sheet. Have the results of the *leverage points method* ready. Work through steps 2 to 6 in silence.
2. Together choose a how-can-we question or problem and write it on the top of the sheet. Individually consider a transformative idea (related to a deep leverage point that was identified in advance) and write it down in box A. Pass the sheet clockwise to the neighbour. (3 min)
3. Read through the solution. Think about what mean sabotage prevents this idea. Write down thoughts in box B. Pass the sheet clockwise to the person next to you. (2 min)
4. Read through solution and sabotage. Consider how to deal with it proactively, find a way to implement the positive suggestion anyway. Write it down in box C. Pass the sheet clockwise to the person next to you. (2 min)
5. Repeat step 3. for field D, repeat step 4. for field E and so on.
6. Last round: read through all the solutions. Write down similarities in field A/C/E on sticky notes. Read through all the sabotages. Write down similarities in field B/D/F on sticky notes. (5 min)
7. Present and discuss the sticky notes aloud in the group. Identify overarching commonalities and write down the idea concept.

Creative cartwheel

How-can-we-ask-questions or pose problems
(write down before starting the silent work)

Solution approach
(write down after the presentation and discussion in the group)

+

A: What leverage point or transformative idea could solve the problem?

C: How could the obstacle be circumvented?

E: How could the obstacle be circumvented?

A/C/E: What are the similarities (enabling principle) in the positive proposals?

-

B: How could this be prevented in any case?

D: How could this be prevented in any case?

Q: How could this be prevented in any case?

B/D/F: What are the similarities (preventing principle) in the negative proposals?

Fig.: based on Luma Institute, Round Robin, modified by Paulick-Thiel & Arlt, 2020

Idea napkin

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template, materials from *Creative Cartwheel* and *Leverage Points.*

Time frame:
30-45 minutes

Roles:
Moderation,
Documentation,
Time management

Basic posture
Creativity - leaving familiar environments and curiously going in search of the unknown
Iteration - welcoming complexity and resistance

What & What For?
The idea napkin supports the compilation of results from an intensive working phase. It contains only the central elements of an idea. The challenge, its solution and the value for one or more stakeholder groups are described clearly and briefly.

Added value
With the short description, the team agrees on the central elements of the idea. This makes the new thing tangible and easier to communicate. For many ideas, a digital napkin is useful, which can also be part of a larger idea database.

Contextual knowledge
The D'Artagnan model by S. Fischer describes ideas systematically. Ideas always have a cause: an unsolved problem has been encountered or an unmet challenge has been seen. The solution is the new thing, which is often understood as an "idea". The value describes the special significance of the solution for those "affected" by the idea.

Procedure

1. Transfer template large. Have results from the *Creative Cartwheel* ready. Start on the left side.

2. Describe the occasion: Ideas always have a cause. What is the problem or challenge for which a solution is to be found? Summarise transformative challenge in own simple words or use *HMW question.*

3. Summarise the solution concept: What is the new way or the particular way to solve the problem?
    a. Introduce each other's expanded ideas from the *Creative Cycle.* Identify overlaps.
    b. Use the results from the *Creative Cycling to* formulate a principled approach to a solution.

4. Describe value: What makes the solution valuable to key stakeholders, our organisation and future generations? What importance do they attach to it?

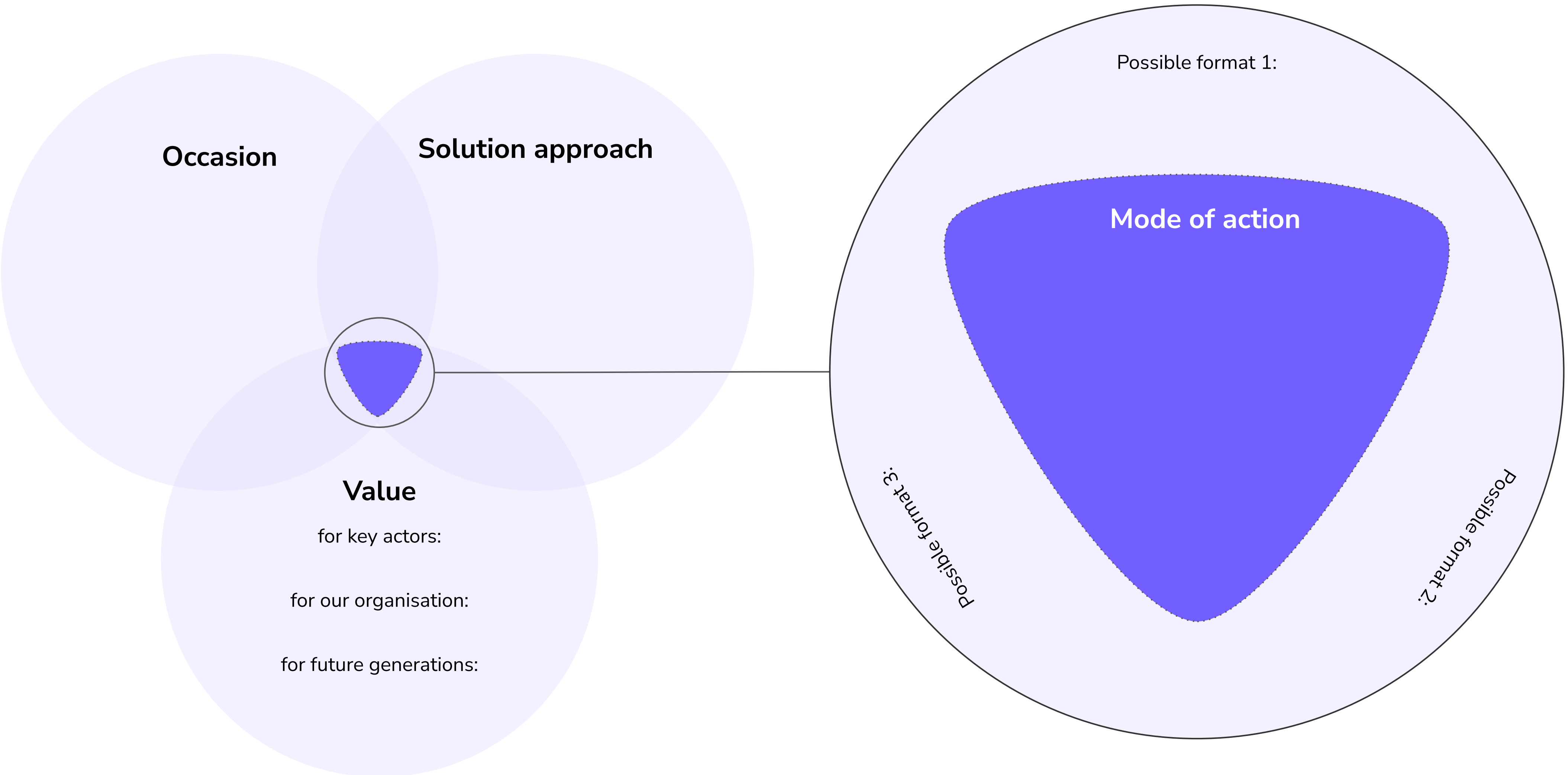
5. Elaborate the transformative core of ideas:
    a. Describe the mode of action: What is the logic behind the idea? What is the system-changing principle behind it? Use insights from the *creative cartwheel* and *leverage points for* inspiration.
    b. In which formats could the impact of the idea be usefully implemented? Do not commit yet, but write down or sketch at least three different options.

6. Keep the idea napkin in a safe place and document it so that you can continue to work with it in the next phase.

Idea napkin

Elements of the idea

Transformative core of ideas



Working title: ______________________________________

Turning Point: _____________________________________

Hashtag: ____

Fig.: based on Fischer, 2012, modified by Paulick-Thiel & Arlt, 2020

Create test base

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template, materials from the *idea napkin* and *actor understanding* or *persona profile.*

Time frame:
30-45 minutes

Roles:
Moderation
Documentation
Time management

Basic posture
Empathy - seeing and wanting to take other perspectives
Iteration - welcoming complexity and resistance

What and what for?
The test base provides the foundation to create a prototype and test it. This overview contains all the information necessary for this: from the key data for the development of the prototype to the organisation of the test situation.

Added value:
All knowledge and task packages are presented coherently at a glance. This creates a communication basis for the involvement of testers, reporting to managers or the delegation of tasks within the team. The test basis can be used to summarise how few resources are needed to test an idea in terms of its value.

Contextual knowledge:
Often the mistake is made to design a solution too much on the basis of assumptions in the project team. In the end, however, what is important to the future users is decisive. That is why we first define the testers before we design the prototype.

Procedure

1. Transfer template in large size. Have the material ready. Follow the suggested procedure and answer the questions in the individual fields. Write down key points. In the further stages, these basic ideas are methodically elaborated.

2. Start with the prototype development section. First, briefly describe the idea to be tested in order to define the framework for further development (1). Based on this, formulate test hypotheses to clarify which functions are to be tested with the prototype (2).

3. Consider who should be part of the test group in relation to the components to be tested. In addition to previous key players, include people with strong or extreme needs. These groups can determine the specifications for the prototype and point the way to an appropriate format (3). Develop key points for the concept prototype, they are an important basis for effective prototyping (4).

4. Switch to the Test Organisation section. First, outline the test situation. In which context can the testers give the most authentic feedback? Describe the situation and environment (5). Plan the implementation based on this (6).

5. Identify necessary resources (7). Consider who has contact with people in the defined test group.

6. Note: In the test with groups that have pronounced/extreme needs, aspects can be examined that, in reverse, contribute to a solution for all.

Create test base

PROTOTYPE DEVELOPMENT

Area to be concretised in stage 2

(1) Brief description Idea

Results →Use **idea napkin**

Name/Hashtag:

Mode of action:

Conceived formats:

(4) Key points concept prototype

In what simple way can we make the value of our idea tangible for different testers? Do we need different versions, e.g. for those affected and those responsible?

Elaborate with →**Concept prototype**

(2) Write test hypotheses

What is there no certainty about?

What is assumed to be true or false?

What can be easily disproved or proven?

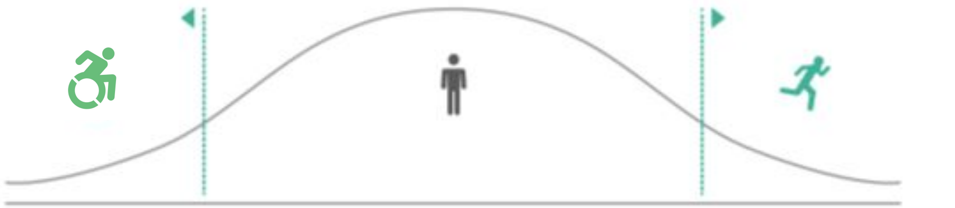
What can be measurably tested with key actors?

Functions / components to be tested:

(3) Define test group

Which groups of people within the key stakeholders have particularly strong or special needs that we should consider when designing the prototype?

Which key actors should be involved to test the hypotheses?



Use insights from the understanding of actors or describe them more precisely with →**persona profile**

TEST ORGANISATION

Concretise the area with →**Planning the test procedure**

(5) Outline test situation

What would be the ideal place or context for the test? Is it necessary to test in different situations e.g. inside or outside the organisation?

(6) Plan implementation

What do we need to organise to make the test situation possible?

How do we evaluate our test?

With →**Document test** necessary data can be collected

(7) Resources needed

Time:

Staff:

Finances:

Knowledge:

Contacts:

Graphic: Design on Ageing: Connected Living, IDEO, 2017, Fig.: Paulick-Thiel, Köbler & Arlt, 2020

Concept prototypes

Materials:
Various pens, paper (types), glue, scissors, Lego, cardboard, plasticine, etc.

Time frame:
30-45 minutes

Roles:
Moderation
Time management

Basic posture
Experimenting - being able to try out the unknown and discard what has been tested
Creativity - leaving familiar environments and curiously going in search of the unknown

What and for what?
Concept prototypes are characterised by a simple and cost-effective implementation of the core idea to be validated. This can be a visualised process, a simple drawing or even a physically touchable object such as a paper prototype.

Added value:
The solution approach can be experienced directly. Through interaction with the actors in the context of use, problems in use are recognised early and can be remedied before money is spent on implementation. In addition, this approach often reveals aspects of the idea that were previously unknown or not considered. As a result, valuable information can be gathered to refine the idea and to add what has been missing so far.

Contextual knowledge:
Studies on user experience show that changes in the product development process in the early stages are about 100 times cheaper than changes in later stages. Prototyping is particularly relevant for public administration in order to promote targeted developments with tax money.

Procedure

1. Review the test basis together. What impact and value of the core idea should be communicated? Which concept prototypes or combinations make sense? Select one or more formats, e.g:
    - **Storyboard** - visualisation in scenes: Illustration and brief description of the most important events related to the envisaged solution.
    - **Chain of experience** - process description with points of contact: Individual steps before, towards, during and after the interaction with the solution are recorded in detail from the persona's perspective.
    - **Paper prototype** - sketch of an object belonging to the solution: simply produced object that makes the new interaction tangible.

2. Consider key actors or persona profiles. In what situation would they encounter the solution? What would their reaction be? Create storyboard and/or experience chain to describe context and use. If applicable, the description related to the solution includes a medium or object that can be made as a paper prototype.

3. Prepare the material. How can this medium or object be recreated in a tangible and experiential way from the materials available? Build a paper prototype. Example: An illustrated software interface as a click dummy. Produce various versions. Select what is best suited for interaction in the test.

4. Check concept prototypes for consistency. Is the experience of the solution and its value made clear? If necessary, repeat steps 2 and 3.

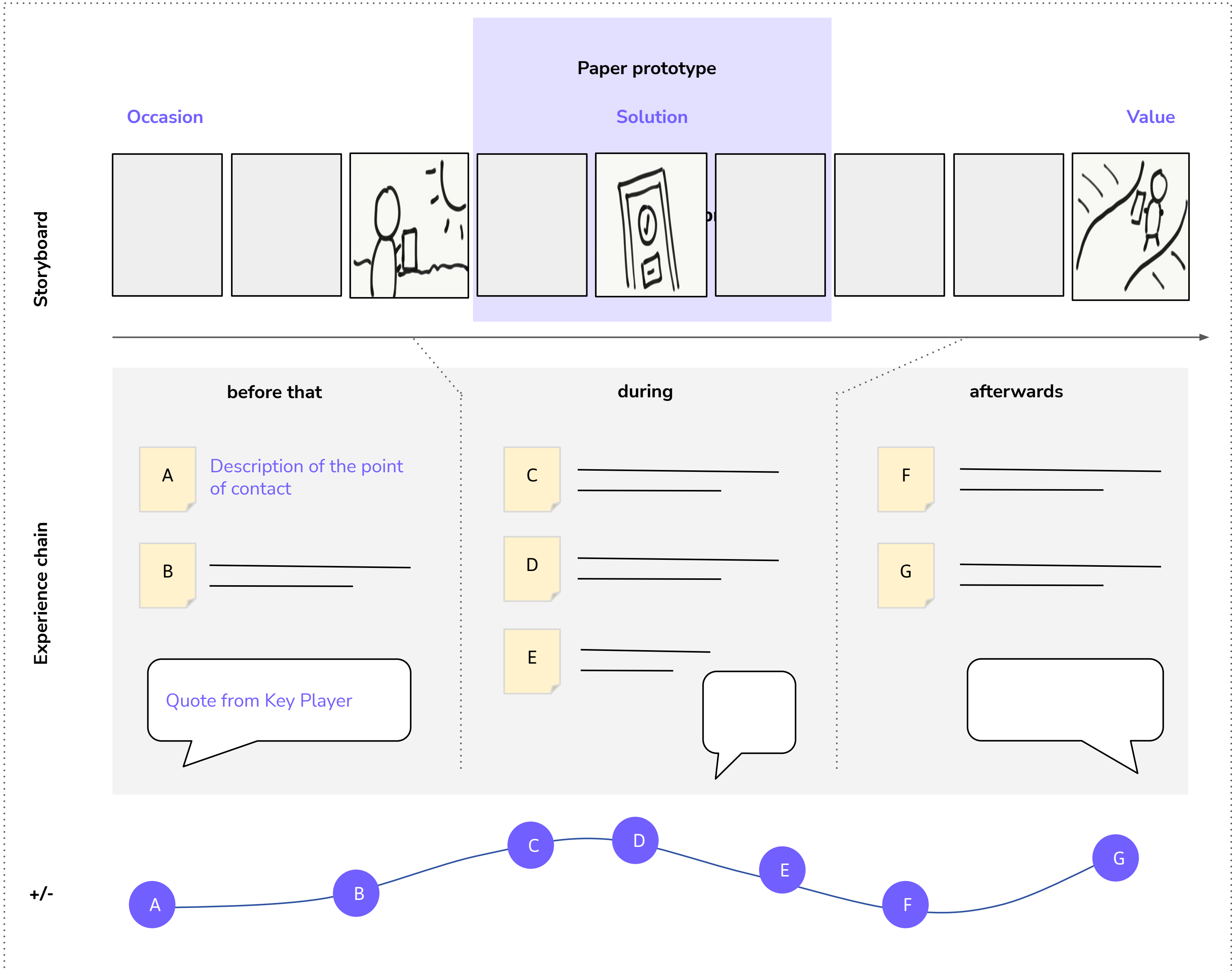


Fig.: Paulick-Thiel, Arlt & Balaz, 2020

Storyboard
Storyboarding is used to depict chronologically, informally and in an easily understandable way the interaction with the envisaged solution in pictures. No artistic talent is necessary for this. The focus is on telling a plausible story in a specific context of action.

Experience chain
Based on the storyboard, a process can be described with the experience chain (user journey map) as an overview of individual touch points with the solution.

Paper prototype
Storyboards and experience chains can be ideally complemented with a paper prototype. Because of their unfinished state, these designs invite honest feedback. Test subjects often interact with them more intuitively and are even willing to redesign them.

→ **Instructions on the next page.**

Suggestions:
Make prototypes in everyday work to be able to communicate thoughts more clearly.

A) Storyboard

01 Select one or more persona profiles. Design the red thread of the story. To do this, embed the occasion, solution and value of the idea in a narrative context. Where, when, who comes into contact with what? Which goals and needs of the key actors play a special role?

02 Create a storyboard template. To do this, hang nine blank A4 sheets next to each other. Each sheet represents a moment in the story to be developed.

03 Outline the experience step by step and describe it in bullet points. Start with the cause or problem on the first sheet. In the last sheet, show the value or the experience in the target state. Use the sheets in between to describe the path from 1. to 9. including introducing the solution, clarifying the interaction of the persona with the solution, showing the provision of the solution, etc. Address emotions in and between the scenes.

04 Round off the story. To do this, check the sequence of scenes and, if necessary, rearrange, recombine or adapt them. Visualise each scene in an impressive way. **Use simple** drawings, photos or additional details (e.g. speech bubbles with quotes) to illustrate the experience.

05 To map different aspects of the solution or the views of different personas, repeat steps **01** to **04.**

B) Chain of experience

01 In the storyboard, identify key scene where the solution is introduced. Up to which scene does the interaction with the solution last? Divide scenes so that three areas - before, during and after - of interaction with the solution are visible.

02 Start in the "before" area and check how often, why and how the persona comes into contact with the solution. Write them down on sticky notes and put them in a logical order. Briefly describe points of contact: What happens? By whom or what is this step made possible? Who else is affected or responsible? How does the persona feel about this step? Round off with a suitable quotation. Repeat the procedure for the other two areas.

03 Record the persona's emotion for each point of contact. Arrange the positive at the top and the negative at the bottom and connect them to form a mood curve. This can lead to further test hypotheses or point to previously overlooked hurdles.

04 Repeat steps **01** to **03** to map the perspectives of additional personas.

C) Paper prototype

01 Within the storyboard or chain of experiences, select one or more interactions with the solution that seem particularly critical and should be reviewed.

02 Use pen and paper or digital drawings to quickly explore different options for interacting with the solution. A3 sheets of paper are suitable as a basis for sketching a software user interface and coloured sticky notes for interaction areas such as buttons or input fields. A paper prototype can consist of several components or sheets for each interaction step.

Text: Public Design Manual

Future Theatre

Materials:
If desired: props to be able to slip into different roles

Time frame:
45-60 minutes

Roles:
Moderation
Documentation
Time management
Observation

Basic posture
Empathy - seeing and wanting to take other perspectives
Courage - Courageously and consciously daring to do something new

What and what for?
Future theatre enables the participants to put themselves in a preferred situation in the future. A situation is presented in which the problem no longer exists through the application of the solution. This allows both the actors and the audience to experience what the new thing feels like.

Added value:
Instead of talking up the new thing, all senses can be used to experience what feels right or wrong about the solution. By stopping or freezing individual scenes, the participants in their role can be concretely questioned about it.

Contextual knowledge:
The Future Theatre is based on the improv prototyping of Liberating Structures. Here, three levels of knowledge are tapped simultaneously: explicit knowledge shared by participants; tacit knowledge discovered through observing the performance of other participants; and emergent knowledge, i.e. new ideas developed together. This powerful combination can be the source of transformative experiences and at the same time it is seriously fun.

Procedure

1. Visualise the solution developed so far in your mind's eye and imagine a situation as a team in which the solution has been used successfully or has had an effect.
2. Define which key actors are important in the situation and assign their roles to people in the team. Everyone involved takes an active role.
3. Set up room and use props if necessary. Transfer documentation templates large or copy onto A4 sheets.
4. Consciously enter into the role and the acting, be completely in the moment:
   - Briefly describe the scenario and the different roles (3 min).
   - Play desired situation (3-5 min).
   - Pause and reflect on column A & B: first alone (2 min), then in the group (10-15 min). At which point did it particularly grate?

1. Re-enact the crunch scene and let the people involved in the situation speak: What doesn't feel right here? Why? How would it feel better? Why? Take a new, better position and experiment for a few minutes until a situation is found that all participants agree with (10-15 min).
2. Finish the presentation and reflect on columns C & D: first alone (2 min) and then in the group (10-15 min). Finally, note down the most important aspects for the further development of the innovative solution.

Suggestion: Identify grating scenes in everyday work and consider together with colleagues how they could be changed.

Idea concept presented:

Most important aspects for the further development of the solution approach:

A: Obvious knowledge

Discuss situation:
What do the performers tell, e.g. when a scene is paused or after the play?

B: Tacit knowledge

Observe situation:
What did the performers or spectators observe during the play?

C: Emergent knowledge

Shaping the experience:
How can the future experience be adapted so that it feels right for everyone involved?

D: Conclusions

Narrow down the solution format:
What does this mean for the format of the solution to be developed? Which functions are relevant?

Fig. & text: based on Liberating Structures, Lipmanowicz, McCandless; http://www.liberatingstructures.com

Test prototypes

Materials
Prototype, observation sheet, feedback sheet, plan material from *test procedure*

Time frame:
30-45 minutes

Roles:
Moderation
Observation

Basic posture
Iteration - welcoming complexity and resistance
Perseverance - Evaluate and adapt work processes with confidence

What and what for?
The test situation and application of the prototype is documented using a simple matrix. The documentation is based on concrete observation points and original quotes. It should be concentrated, during the whole test process and per tester. Testers are people who give concrete feedback on the developed solution concepts and range from colleagues to family members to key stakeholders.

Added value:
After the test, the documentation is reviewed together as a team. In addition to the test questions, the body language and interactions of the users can also provide relevant insights into the functionality of the solution. The findings are condensed in the template Evaluate Test.

Contextual knowledge:
In the case of several test situations, it is advisable to meet as a team directly after each run and reflect on the experience. In addition to the documentation during the test, which is fundamental for the overall evaluation, an ad-hoc evaluation enables spontaneous adjustments to the prototype or the test situation and accelerates learning.

Procedure

1. A test is run according to a recurring pattern:
   - Arrival of the testers and preparation for the test
   - Test situation incl. interaction with the prototype
   - Obtain feedback from the testers and conclude the test situation (see *Planning the Test Procedure*).

2. Work as a team before, during and after the test. Roles are distributed. In addition to the moderator, one observer per tester is appointed, each of whom uses a documentation template. Observations can be collected throughout the test.

3. While the tester interacts with the prototype, the observer documents the interaction and behaviour of the assigned test person. Pay attention to body language, facial expressions, tone of voice and choice of words. Use the template to record observations:
   - What works?
   - What are the questions about?
   - What new ideas are there?
   - What does not work?

4. During the feedback phase, feedback from the testers is gathered in a moderated manner. Questions are also asked about the prototype and the concept. The aim is to understand the deep thoughts of the testers. Documenters take further notes in the A,B,C and D boxes. Original quotations are particularly interesting.

5. Once the test situation has been moderated and completed, complete notes and conclude with a key phrase or observation.

Tester Marking/abbreviation:
Date:
Place:

Key phrase or observation:

Test prototypes

A: What works?
What was exciting?
What was most appreciated?
What generated resonance in relation to the idea?

C: What new ideas are there?
Were there any suggestions for improvements?
What surprised us?
What would we like to try next?

B: What are the questions about?
What was questioned?
What needs further investigation?
What made us curious?

D: What is not working?
What has created resistance?
What was rejected?
What was not understood in relation to the idea?

Fig.: based on design kit IDEO, Acumen, translated by Paulick-Thiel, 2020

Persona profile

Materials:
Findings and data from the field investigation, understanding of actors
Persona template, flipcharts, pens, sticky notes

Time frame:
30-45 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Empathy - wanting to see and take other perspectives
Creativity - leaving familiar environments and curiously going in search of the unknown

What & What For?
Persona profiles describe fictional characters. They usually represent a group of people, such as our key stakeholders, who share common interests, behavioural patterns or demographic similarities. They are initially based on aggregated assumptions that are enriched and underpinned with insights from the research.

Added value:
Different key stakeholder groups have different needs, experiences and expectations that can be empathically highlighted in persona profiles. Profiles of extreme or marginal actors support the development of solution concepts that are of value to a wide range of users.

Contextual knowledge
The term "persona" comes from the ancient Greek theatre. Here, the persona represented a mask worn by actors to underline their role and served as a mouthpiece for them. Today, personas represent a mouthpiece for certain types of users.

Procedure

1. Define groups of actors in the organisation and society to be illustrated with personas. Select at least 3 distinctive key or marginal groups.
2. Provide research data according to the selection. Make artefacts, key images, quotations, screenshots clearly visible for all. For each group of actors, transfer a large template, e.g. to two flipcharts. If necessary, work in parallel in small groups to develop the persona profiles.
3. Start by answering the question "What am I like? Use pre-sorted data from the field survey as inspiration. Write down answers on sticky notes and condense them into salient statements per question. Based on this, answer the questions in the section "Who am I? Put a face to the data and round off the development with a drawing or collage.
4. Check if the profile is realistic or if it feels too contrived. The most common trap in creating persona profiles is to create idealisations that are not found in reality. Ask colleagues who have real contacts with the groups in question to match them. Adjust the persona profile accordingly.
5. Document results. Because of their background stories and distinctive behaviour patterns, personas are very memorable. Therefore, it is recommended not only to use them for the →concept prototype, but also to communicate them physically or digitally in the organisation.

Persona profile

Who am I?

Illustration
(e.g. drawing or collage)

Key phrase
(e.g. from the interview documentation)

About me
What is my name?
What is my nature type?
What is my gender? (m/f/d)
How old am I? (Span)

Fictitious quote
(e.g. What is my conclusion after the first application?)

My profession
What have I learned? Where do I work? What is my field of work in the organisation?

Personal
Where do I come from? Family? What is my mini life story?

What am I like?

My interests
What do I spend my free time doing? What do I like? What do I read, watch, listen to regularly?

My challenges
What is challenging in my work? In everyday life? What causes me difficulties or headaches?

My behaviour
What do my routines, rituals, daily routines look like? What is my function?

My moments of success
What are my professional moments of success? In my private life? What do I particularly enjoy at work?

My needs
What do I need? At work? In everyday life? What is essential for me? What is missing?

My goals
What am I striving for? Where do I want to go? What is my personal goal?

What do i think about the idea?

Pro:
How does the idea gain value for me? Why do I think the idea is good?

Contra:
What stops me from applying the solution? What creates resistance?

Text: based on Nesta, Fig.: Paulick-Thiel & Köbler, 2020

Plan the test procedure

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
30-90 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Iteration - welcoming complexity and resistance
Perseverance - Evaluate and adapt work processes with confidence

What and what for?
The test progression describes the stages of the test situation over a limited period of time (e.g. 45 min). The detailed planning of important interaction points with the testers supports the implementation of a methodically guided test run in which dramaturgy and content are combined with roles and attitude.

Added value:
Acting out the test situation specifically strengthens the effective interaction of the team and enables an optimal testing experience for the participants. By adapting the impulse questions, the assumptions regarding the solution can be specifically examined and adjusted.

Contextual knowledge:
The structure of the test situation is based on participant observation. The advantage of this method is an examination situation that is close to the everyday life of the users. By revealing routine behavioural patterns that often occur unconsciously, truly authentic insights can be gained.

Procedure

1. Transfer the template to a larger piece of paper.
2. Reflect on the key points along the route:
   Interaction: When does who get involved? Which form of interaction is appropriate at which points?
   Roles: Clarify roles. Who conducts the test, who documents it? If necessary, run through with colleagues.
   Time frame: How long should testing take?
   Material: What material is needed to:
   set up the room?
   redesign the path to the room if necessary?
   to carry out the test?

1. **Information:** What information is needed to:
   a. communicate the test?
   b. prepare the testers?

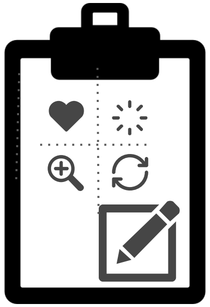
2. **Questions:** Which questions should be answered? See hypotheses in Assembling a Test Base. Use impulse questions from the template and adapt them if necessary. See Compiling hypotheses for test basis.

3. **Consider a closing point:** For example, ask for your own summary of the most important aspects, thank you and offer further involvement if necessary.

4. Write a short description of testing in the context of the company. Write a cover letter to contact testers.

5. Put together working materials for the test persons, e.g. clipboard with paper, pen, sticky notes.

Plan interventions



1 **Welcome hot**

5 min
2 **Brief presentation of the test background**

Verbal or digital depending on protoype format, signing consent form.

3 min
3 **Attunement**
Explain role as tester

Briefly introduce the context of the test and the aims of the procedure, clarify questions of understanding, do not explain, anticipate or advertise anything.

4 **Test situation launch**

Be prepared for follow-up questions and answer them later if necessary, from now on:
→Document the test

Let the prototype work and <u>not</u> sell or explain it!

10 - 15 min
5 **Let interact**

Observe interactions and document.

5 - 10 min
6 **Ask for honest feedback on the prototype**

Select relevant questions:
What do you think about this idea in general? What questions have come up for you? What would you change? How? What would you keep? Why?
Listen with interest and ask questions of understanding only if necessary, no dialogue.

5 - 10 min
7 **Ask key questions that the prototype should answer**

Select relevant questions:
What would motivate you to apply this solution? How easy or difficult is it to understand the value? What should be clarified? What are the benefits of the solution? What features or aspects could increase the benefits?
Involve testers in the flash interview. Invite testers to draw themselves if necessary.

5 - 10 min
8 **Letting go of expertise and asking conceptual questions**

Select relevant questions:
If you would like to design the desirable goal X, how would you proceed? What would have to be done to prevent the achievement of this goal? How could the obstacle be overcome? What would need to be considered in further development?
Have testers associate verbally, with drawings or artefacts.

5 min
9 **Thanks & Closing**

Give reference to anonymised evaluation of the test results and, if necessary, end with a short summary and outlook.

Tester:inside
N° from total:

Test run
N° from total:

Recommendation:
max. 2 testers per run

Fig.: based on DesignKit, Acumen/IDEO, modified by Paulick-Thiel, Köbler & Arlt, 2020

Evaluate test

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
30-45 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Perseverance - Evaluate and adapt work processes with confidence

What and for what?
The reflection approach of "3 x What" makes it possible to look back on a common experience in a structured way. This is achieved by going through three stages: collecting facts (What?), interpreting the facts and deriving conclusions (What then?) to deciding on the next logical steps (What now?).

Added value:
Every voice is heard, with important insights asserting themselves and new directions emerging. This joint approach prevents the misunderstandings that otherwise fuel disagreement about next steps.

Contextual knowledge:
What? So What? What if? Now What? is a liberating structure developed by Henri Lipmanowicz and Keith McCandless. Chris Argyris published this ladder of inference in Reasoning, Learning, and Action: Individual and Organizational (1982). Peter Senge popularised the concept through his book The Fifth Discipline: The Art and Practice of the Learning Organisation (1990).

Procedure

1. Transfer template in large size and have material ready. Visualise the situation of the test again. Use documentation from the test run for this.
2. WHAT? Use impulse questions in field A to reflect on the test in silent work. Write the most important aspects on sticky notes (2 min). Each person presents what they have written down and puts the sticky notes in the corresponding section in box A (1 min per person). Look for similarities together and put the sticky notes in box A together (5 min).
3. WHAT THEN? Look at patterns and think alone about what can be derived from them. Use impulse questions in field B and, if necessary, say a heartfelt goodbye to cherished aspects. Write the most important aspects on sticky notes (2 min). Each person presents what they have written down and hangs the stickers in the corresponding area of the matrix in field B (2 min per person). Once all the slips are up, group similar aspects in the inner part of the boxes.
4. WHAT NOW? Look at patterns and think alone about what this means for further development. Use impulse questions in box C. Each person presents what they have written down and puts the slips of paper in the corresponding section in box C (2 min per person).
5. Document all results.

Suggestions: Using the question formula 3 x What as a conclusion for work meetings or workshops

Evaluate test

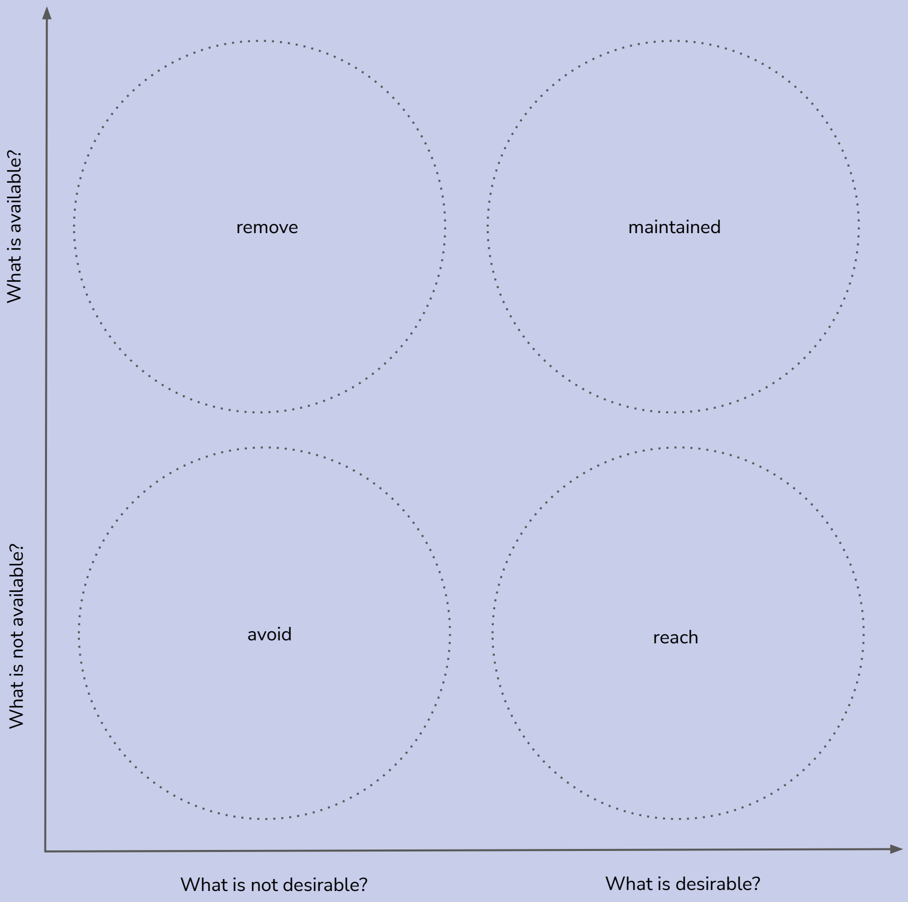
A: WHAT ?
What happened during testing? What was special?

Observations:
What was observed?

Opinions:
How do we assess this?

Evidence & Facts:
How can we tell that the opinion is provable?

B: WHAT THEN ?
What can be determined based on the data in field A? What conclusions can be drawn from the observations, opinions and facts?



C: WHAT NOW ?
What is necessary to learn from the conclusions in field B?

Confirmed assumptions:
Which assumptions have been confirmed?

Foundations for further development:
Which aspects should be included and deepened in any case?

New test hypotheses:
Which assumptions should be investigated in a new test situation?

Fig.: based on Liberating Structures & Dark Horse, adapted by Paulick-Thiel & Köbler, 2020

Golden circle

Materials
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster

Time frame:
20-50 minutes

Roles:
Moderation
Documentation
Time management

Basic attitude:
Creativity - curiously going in search of the unknown

What and for what?
The golden circle is a communication tool consisting of three questions: What? How? Why? At the centre is the question of WHY (past) and WHEREFOR (future). The cause and the necessity form the starting point of communication. This stimulate the human imagination and identification can arise before explaining WHAT exactly HOW is to be done. The chances of implementation increase measurably.

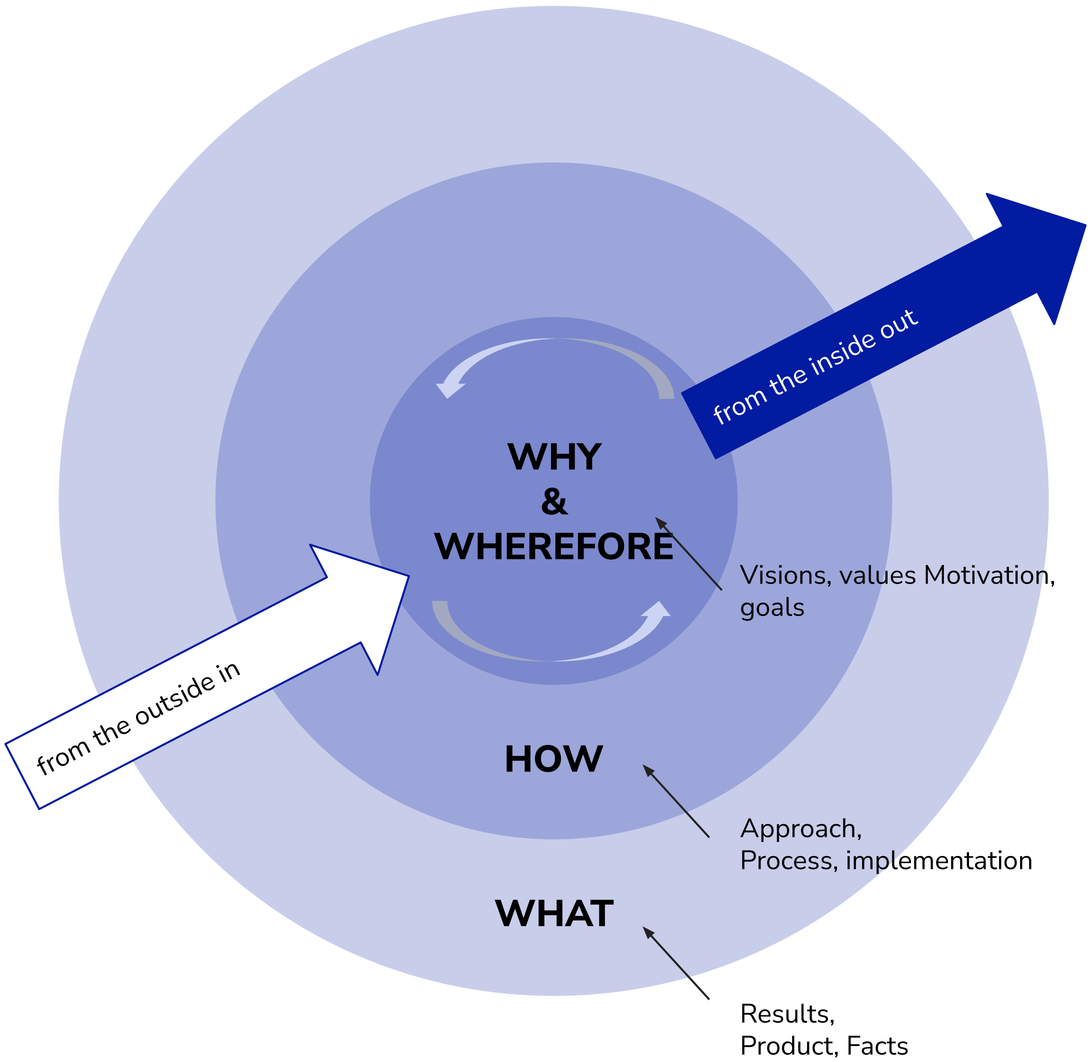
Added value:
Values and visions become more tangible, more real and more shareable with other people - goals are better communicated and can be pursued in the long term. In the team, identification with the project is strengthened and it is easier to inspire other people.

Contextual knowledge:
Simon Sinek, the inventor of the Golden Circle and cultural anthropologist, finds: Many of us think and communicate wrongly because we don't know our real motives. They explain what they do, or even how. Yet it is the WHY that gives the whole thing a meaning and a goal. And that is exactly what is decisive for success and persuasiveness.

Procedure

1. Transfer template. Prepare the material. Follow the suggested procedure for the work. Work from the inside out and answer the impulses in the individual fields. Each team member gets their own Post-Its and a pen to write down key points.
2. Start with the field WHY & WHEREFOR. This is about one's own conviction. The WHY clarifies, with a view to the past, for what reason something should be done. The WHY points to the future and shows the purpose of the action. If necessary, spend the first minute alone thinking about the reasons. Then discuss the thoughts in the group and use impulse questions to concretise them. Write down the visions and values, motivations and goals. Describe one post-it per thought and link similar points together.
3. Switch to the HOW field. What will be done or should be done in the experiment to achieve the WHY? Discuss the thoughts together on the basis of the impulse questions and note down the approach, possible steps and things worth knowing about the concrete implementation. Describe one post-it per thought and connect similar points.
4. Switch to the WHAT field. If everything is done that is described in the field HOW, what is the visible result? Discuss the thoughts together using the impulse questions and note down the tangible results, products and facts. Describe one post-it per thought and connect similar points.
5. Finally, check all post-its for their relevance in the communication. Mark or formulate the 3 most relevant points per field. Ensure that the argumentation in the circle is coherent from the inside to the outside and generates resonance.

Golden circle



WHY & WHEREFORE

What is the vision (of a better world)?
What values are being pursued?
What is the drive and motivation for the experiment?
What is the goal to be achieved?

HOW

What approach is chosen to pursue the vision?
What steps are necessary for this?
What is important to know about implementation?

WHAT

What are the visible results of this approach?
What products are created?
What quantitative or qualitative added value has been created as a result?

Fig.: based on Golden Circle by Sinek, adapted by Paulick-Thiel & Arlt, 2021

Explore Exnovation

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
30-50 minutes

Roles:
Moderation
Documentation
Time management

Basic posture
Self-reflection - Reflecting self-critically on one's own role
Perseverance - Evaluate and adapt work processes with confidence

What and for what?
If innovations are to be integrated and established, the existing must be consciously terminated in order to create space for a new status quo. Identifying unsustainable structures is fundamental to exploring how old structures can be replaced by new ones.

Added value:
A particular challenge of transformative change is the termination and ejection of unsustainable technologies, structures and social practices. The conscious engagement with deconstruction processes supports the discovery of important connections between the policy system, public administration and one's own everyday work.

Contextual knowledge:
Innovations and the "allure of the new" are not sufficient for sustainable transformation processes. Exnovation and innovation can be understood as two sides of the same coin. A central concept in exnovation of social practices, besides termination, is a practice of behavioural change and behavioural change. It is about the social dimension and challenging traditional patterns of behaviour.

Procedure

1. Transfer template. Prepare the material. Work from the big to the small and use the impulses for processing. Write down the working title of the transformative idea in the top left-hand corner.
2. Start by working individually and silently for 5 minutes. Read out aloud the attunement to the process. Each person considers what practices and processes need to be in place so that the transformative idea is actually implemented and supported. Respond to the impulses in the circles. Write down each thought individually on Post-Its. Place Post-Its in the circles without comment.
3. Continue working together in the group (5 min per circle). First look at the circle "political system". Present Post-Its in turn. Link similar thoughts together. Which previous institutional practices and routines interfere with the implementation of the idea? Decide together which 2-3 points or clusters from the circle should be moved to field A: Policy system.
4. Work on the circle "organisation" in the same scheme as 4. Which previous organisational ways of working hinder the implementation of the idea? Hang the group decision in field B.
5. Work on the circle "everyday working life" in the same way as 4. Which previous personal habits interfere with the implementation of the idea? Hang the group decision in the field C.
6. Finally, visualise connections in all 3 fields by e.g. arrows and briefly justify e.g. with Post-It per arrow connection.

Transformative idea (working title):

Attunement

To implement your transformative idea and favour a sustainable development of our society...

Explore Exnovation

Policy system

What should be dismantled within the framework of (environmental) policy? Why?

Organisation

What should be abolished in the way your organisation works? Why?

Everyday work

What should be stopped in the habits of your personal working day? Why?

A: Policy system

[...] should be exnovated within the framework of (environmental) policy, because [...]

B: Organisation

[...] should be exnovated as part of the way my organisation works because [...].

C: Everyday work

[...] should be exnovated in the context of my personal daily working life, because [...]

Fig.: Paulick-Thiel & Arlt, 2021

Changing cultures

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template, results *Explore exnovation*

Time frame:
30-60 minutes

Roles:
Moderation
Time management

Basic posture
Self-reflection - Reflecting self-critically on one's own role
Perseverance - Evaluate and adapt work processes with confidence
Courage - Courageously and consciously daring to do something new

What and for what?
Cultural change requires intervention in complex, living systems. By designing, testing and embedding change impulses from within, participants raise their awareness of interactions within and between systems. What is to be preserved is as important as the identification of necessary modifications.

Added value:
The regular revision of cultural foundations supports the development of self-organisation and values internal expertise. This increases trust in solutions that emerge from within the organisation and strengthen cohesion.

Contextual knowledge:
The AQAL matrix adapted here is a tool from systemic organisational consulting that, unlike common management consulting approaches, reduces dependencies on the consulting company and promotes competence building in the organisation. In their book "The Loop Approach" Klein & Hughes describe how organisations can be transformed from within.

Procedure

1. Transfer template. Prepare material. Review and visualise the results from *Exploring Exnovation.* Write down the working title of the transformative idea in the top left-hand corner. Read out loud the introduction to the process. Work on the quadrants counter-clockwise. Use the impulse questions.

2. Start with "we//inside": Each person reflects on the impulse - What am I passionate about in our cooperation? Write down thoughts (1 min). Then introduce them in turn and place Post-Its in the quadrant. Consider in the group which values, visions and ways of dealing are visible in them. Link similar aspects and concretise or add to them if necessary.

3. "inside/me": Each person reflects on the impulse - What am I looking forward to? Write down thoughts (1 min). Then present and locate them in turn. Consider together which attitudes are visible in them. Link similar aspects and add to them if necessary.

4. "I/outside": Each person reflects on the impulse - What am I doing? Write down thoughts (1 min). Then present and locate them in turn. Consider in the group which abilities are visible in this. Link similar aspects and, if necessary, make them more concrete or add to them.

5. "outside/us": Each person reflects on the impulse - What have I already stopped believing in? Write down thoughts (1 min). Then present and locate them in turn. In the group, consider which structures, processes and spaces become visible. Link similar aspects and, if necessary, concretise or add to them.

Transformative idea (working title):

Imagine that your organisations support the implementation of your transformative idea to the maximum ...

Attunement

A new collaboration changes practices, routines, ways of working and habits. These will now be examined in more detail. The future organisational picture is sketched out per quadrant.

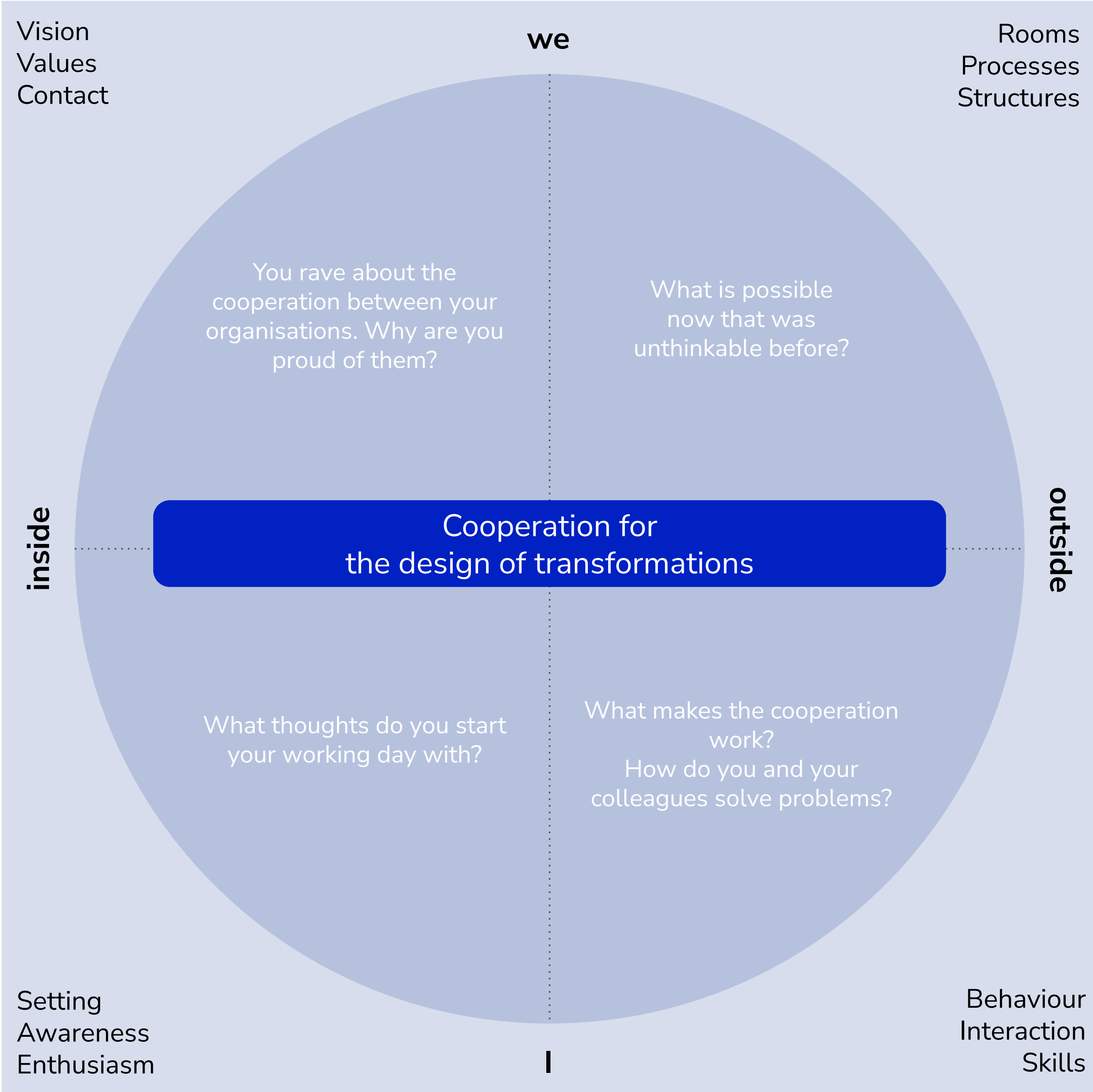


Fig.: based on AQAL Matrix, adapted by Paulick-Thiel & Arlt, 2021

Routine loop

Materials: Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template, *Converting* results from *cultures*

Time frame:
30-45 minutes

Roles:
Moderation
Time management

Basic posture
Courage - Courageously and consciously daring to do something new
Perseverance - Evaluate and adapt work processes with confidence

What and for what?
The "routine loop" can be used to describe the basics of a habitual action. Working through each of the four steps is essential. On the one hand, to change a habit. On the other hand, it is crucial for realigning organisational routines in the context of transformative policy-making.

Added value:
Routines or habits unconsciously guide our everyday interactions. Consciously shaping them is an important means of promoting cultural and also social transformations. If we imagine cultural change processes as a long-distance flight, then a completely new destination can be reached by minimally adjusting the direction of travel.

Contextual knowledge:
Habits determine between 30 and 50 percent of daily actions, which is why tiny changes can make a big difference. Under the title Atomic Habits, James Clear describes how the analysis and redesign of behavioural loops can be approached individually. In doing so, an ethical compass is fundamental to initiating value-led change without harming others.

Procedure

1. Transfer template. Prepare material and view results from *Transforming Cultures in* the "we/outside" quadrant. What changes in this field can be supported by building new routines? Define a routine and write it in the middle of the template. Work through the quadrants together in a clockwise direction. Use the impulse questions.

2. Start at A: Think about how to make the new routine attractive. In brainstorming, write down all the ideas individually on Post-Its and hang them up in A. Sift through the collection and mark 3 ideas in which cooperation becomes a freestyle activity instead of a duty.

3. Switch to B: Think about how the routine can be easily implemented. Write down suggestions individually on Post-Its and hang them in B. Sift through the collection and mark 3 that will help the group and the individuals to overcome the "inner bastard".

4. Switch to C: Think about how to end the routine with joy. Write down ritual ideas individually on Post-Its and hang them in C. Sift through the collection and mark 3 that can be used to end a collaborative moment with a smile.

5. Change to D. Think about how to make the new routine tangible for all participants. Write down triggering moments individually on Post-Its and hang them up in D. Review the collection and mark 3 that are most likely to be integrated into the daily work routine.

   Note: Test routine in inter-organisational cooperation. Procedure can be repeated for any number of routines.

Routine loop

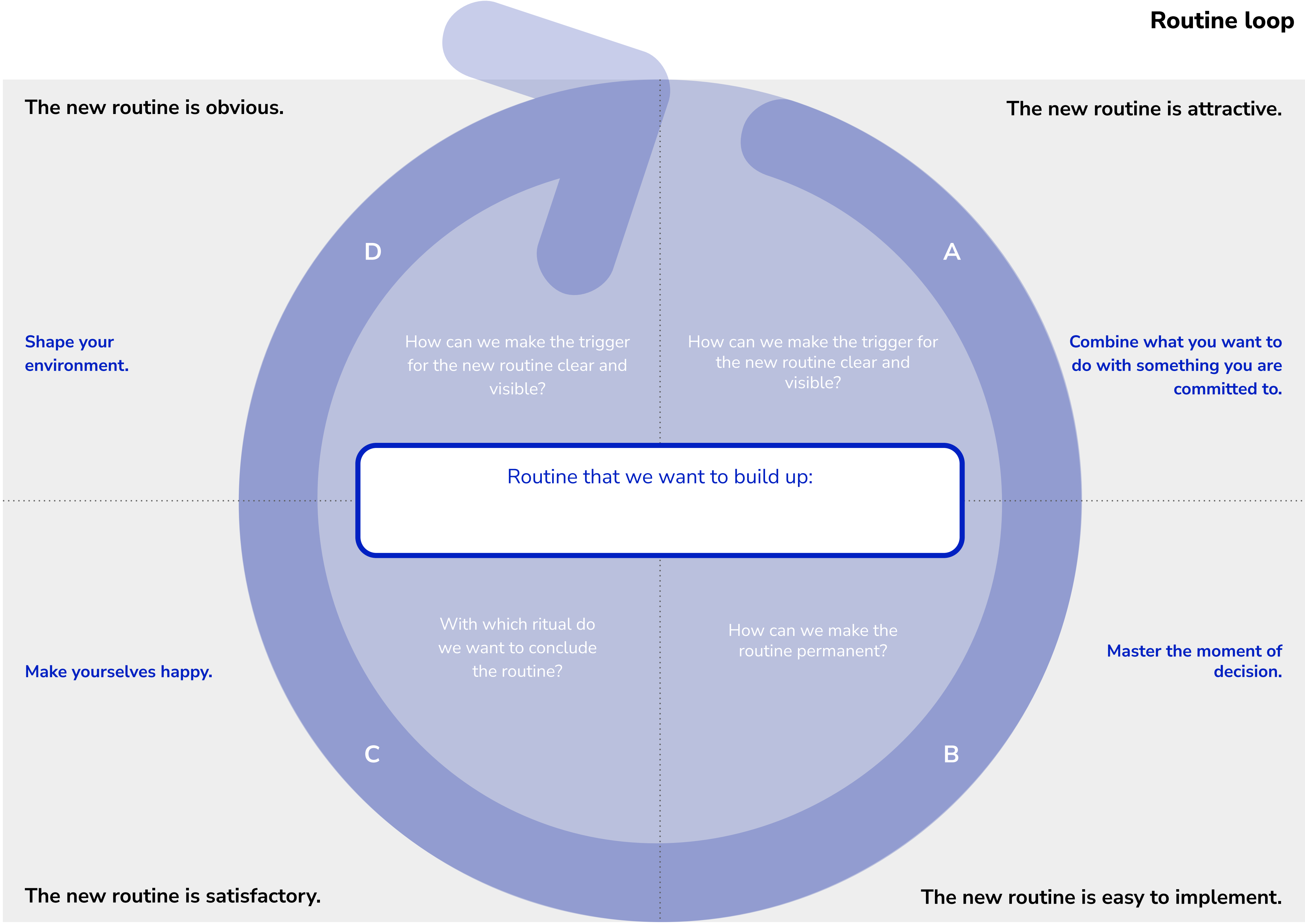


Fig.: based on Habit Loop by Clear, adapted by Paulick-Thiel & Arlt, 2021

Storytelling blueprint

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
45 minutes

Roles:
Moderation,
Documentation,
Time management

Basic posture
Creativity - leaving familiar environments and curiously going in search of the unknown
Iteration - welcoming complexity and resistance

What and for what?
Whether it's getting others excited about a cause or getting the support of potential partners, persuasion starts with a compelling story. To motivate people to change, they need to be invited to imagine something new. This means creating stories that are memorable.

Added value:
Stories can move, mobilise and motivate people to change and take action. Narratives stick in our brains, move us (literally) and increase empathy. Good stories connect clarity with emotions and images.

Contextual knowledge:
There is a long-standing science behind the way storytelling works. Psychologists and neurologists have found that stories stimulate parts of the brain that enable us to sense the thoughts and emotions of others. The release of dopamine increases memory and the release of oxytocin encourages cooperation.

Procedure

1. Transfer template. Have the material ready. Write down the working title in the top left-hand corner. Use impulses for processing. Let the different experiences and perspectives of the group members flow into the process.
2. Start with the "audience": Consider which people should be inspired by the transformative idea. Write people, roles or institutions individually on Post-Its and locate them in the field. If necessary, link similar ones together. Decide on one person (group) for the time being - mark Post-It or cluster and work on fields 2 to 4 for these.
3. Switch to "relevance": Consider why the transformative idea might be important to the person (group). Brainstorm points and write them down individually. Locate Post-Its in the field.
4. Switch to "New Impulses": Consider what background the person (group) has and what formulations could be used to convince them of the transformative idea. Brainstorm (new) formulations and write them down individually. Locate Post-Its in the field.
5. Switch to "Feeling/ Doing/ Remembering". Think about what experiences the person (group) could have with the transformative idea. Brainstorm thoughts, write them down individually and place them in the field in the appropriate section under "feel", "do" or "remember".
6. Finally, consider boxes 2 to 4 coherently. Select expressive elements from the individual fields and put them together to form a convincing narrative thread. Record the result.
7. If necessary, repeat steps 3 to 6 for more people (groups).

Working title of the transformative idea: ____

Storytelling blueprint

1. PUBLIC	2. RELEVANCE	3. NEW IMPULSES	4. FEEL / DO / REMEMBER
Who is being addressed? With whom should a connection be established? Who should be won over as fellow campaigners?	Why is the idea relevant to them? What do you want them to be inspired to do?	How would you rephrase your idea for these people? What metaphors are supportive?	What do you want them to do after hearing, seeing, experiencing or trying out the idea...?
			... feel? ... do? ... remember?

Fig.: based on IDEO Storytelling, adapted by Paulick-Thiel & Arlt, 2021

Communication pyramid

Materials:
Results from *storytelling Blueprint*, pens, sticky notes, a large piece of paper e.g. flipchart or back of a poster, template

Time frame:
20-30 minutes

Roles:
Moderation,
Documentation,
Time management

Basic posture
Empathy - seeing and wanting to take other perspectives
Courage - Courageously and consciously daring to do something new
Iteration - welcoming complexity and resistance

What and for what?
The communication pyramid helps to prioritise information in different levels. Here, information, numbers, data, facts and experiences can be condensed into a communication thread. It can be applied to a variety of communication tools and formats, e.g. drafting a set of slides, writing an article, sharing research results, presenting a project, etc.

Added value:
The structure follows the 3-30-300 rule to make messages effective and efficient for the (target) audience. The most important thing is stated as a concise core statement at the beginning of the communication - 3 words. Next comes an overview-like summary - 30 words. On the third and last level, all relevant detailed information is named that supports and concretises the core statement made - 300 words.

Contextual knowledge:
In contrast to the scientific structure, which leads to a core statement through a process of argumentation, in pyramidal communication the problem solution or conclusion is at the beginning.

Procedure

1. Transfer template. Have the material ready. Write down the working title in the top left-hand corner. Use the explanations and impulses on the individual levels for processing.
2. Start at the "call": Think about what people should do through or for the implementation of the transformative idea. Brainstorm slogans, write them individually on Post-Its and place them in the field. If necessary, link similar ones together. Decide on a call for the time being - stick the corresponding post-it in the pyramid and work on the next level.
3. Switch to "Summary": Consider what information is relevant to support the call concisely. Collect information and write it down individually. Locate Post-Its in the field. From the collection, hang the 3 most concise pieces of information in the pyramid.
4. Switch to "Details": Consider which arguments, figures, data and facts support the information in the "Summary" field. Write down details one by one. Locate Post-Its in the field. Review the collection of details together and assign them to the individual pieces of information from the summary in the 3rd level.
5. Finally, look at the Post-Its in the pyramid in a coherent way. If necessary, visualise the connections with arrows. Record the result.
6. If necessary, repeat steps 3 to 5 for another call.

Working title of the transformative idea: ______________________________________

Communication pyramid

3 Words - The Call
A key message or headline: can be a short sentence, a slogan, a quote that captivates and succinctly draws attention - less is more at this level.

30 words - The summary
Introduces the topic or main point and serves to inform quickly - supported by visual elements as in an elevator pitch.

300 words - The details
The information conveyed is supported by concrete arguments, analytical data and facts. They prove the main point and can provide inspirational support for what has been discovered.

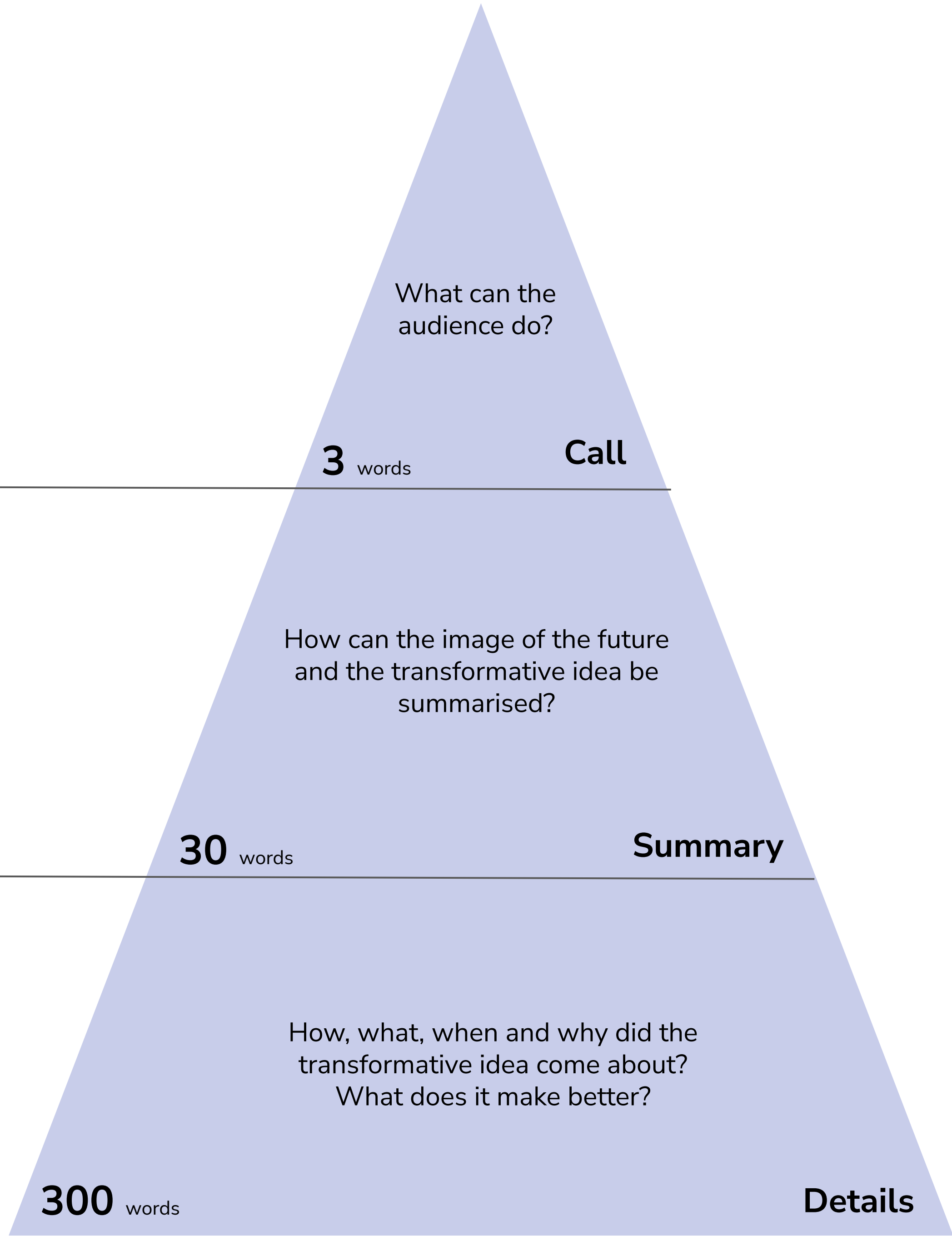


Fig.: based on NESTA,
adapted by Paulick-Thiel & Arlt, 2021

Future slide set

Materials:
Pens, sticky notes, a large piece of paper e.g. flipchart, template, set of slides, guideline
Results Idea napkin, Golden Circle, Storytelling Blueprint, Communication Pyramid

Time frame:
30 - 90 minutes

Roles:
Moderator:in,
Time management

Basic posture
Empathy - seeing and wanting to take other perspectives
Perseverance - Evaluate and adapt work processes with confidence

What & What For?
The future slide set makes it possible to explore and describe a new reality together. The interview in the future present triggers a process of cognition through which the path to implementation can become visible.

Added value:
What if we could beam ourselves into the future where the transformative idea has already been successfully introduced? We would experience how everyday life has changed. We could experience the impact and report on it. Which milestones were really important for success? Which activities and promoters were crucial? What hurdles were overcome? This information can be summarised in an article and makes it easier to inspire co-creators.

Contextual knowledge:
Extensive changes often evoke fear. In order to awaken the desire for the new, thinking and leading from the future must be practised. The Theory U of the MIT management researcher O. Scharmer particularly promotes this approach.

Procedure

1. Adapt the introduction: In the gaps, insert a concrete date in the future when the transformative idea has already been implemented and people are working with it. Have a set of slides and guidelines ready.

2. Get the group in the right mood for the process. Dare to look into the future together: Group member reads out the introduction effectively and memorably for all participants.

Task:Translate the essence of the transformative idea concisely into a meaningful set of slides. To do this, it is important to formulate the previous **core statements of** the concern for the chosen **target group in** such a way that the desired **effect of** the idea becomes comprehensible and generates resonance with the audience.

1. On a flipchart or whiteboard, compile all relevant core information such as success factors, hurdles, methapers and figurative words. Based on this, work on the set of slides. Read the "slide guide". Sketch the entire set of slides in the group on the basis of the impulse questions (30 min) - to do this, assign slide headings, important core statements, necessary information and facts to the individual slides. Visualise image ideas in simple drawings. As a first check for consistency: The slide headings together make a dramaturgical mini-story.

2. Divide and elaborate the individual slides in the team. Record the chained information electronically in the template and arrange it in such a way that it arouses interest and attention for the idea.

3. Review the entire set of slides together and make sure that the transitions are coherent and that the tension is maintained.

Introduction: Looking into the future

Read aloud for all present:

Today is **[insert date in the future]**. The transformation started with the first workshop [insert **number]** years ago. In the first six months, discussions were held, ideas were developed and tested before the boards approved the initiatives developed. The solution was successfully introduced. Since **[insert date three months ago in the future]** we have been working in this way and are seeing the first results and impacts.

I would like to invite you to experience the present of the future with us. Please join me on **[repeat date in the future from above]:**

- It is a sunny day. You are getting ready for a new week in the **[name of own organisation]**.
- A lot has happened in the last few years. You are looking forward to the tasks ahead.
- You walk through the building in your mind: What do you hear? What do you see? What do you feel? What do you perceive in the conversations of your colleagues?

Slide set guide

Connect everything so far:
What powerful story can be used to summarise the journey to and with the transformative idea? Have all the key outputs ready (idea napkin, golden circle, storytelling blueprint and communication pyramid). Use the information, data, facts and examples they contain about the idea to create a set of slides that inspires implementation.

Content that encourages further reading:

- **"Open big ...!"** → Write an impressive introduction and continue the exciting thoughts of the headline.
- **Each sentence is a single work** → Uses strong words & metaphors to engage readers and say the right thing.
- **Attention says thank you!** → Use subheadings and bulleted lists to consciously direct the eyes and keep the focus.
- **The story that seduces...** → Embellish content with everyday hero:ines, hurdles overcome and present their resolution emotionally. Builds in statements and active learning moments to encourage further reading.
- **The image with that certain something** → Choose meaningful images that will be remembered and encourage people to recommend the article.
- **"... finish big!"** → Write a successful ending and leave the reader motivated with a new perspective.

With which captivating slogan or headline can your story be summarised? What would DIE ZEIT write about it on the front page? What words can be used to provoke the attention of the readers?

Title that generates attention

Subtitle

What is the term in the jargon? - Establish connectivity with administrative language and the audience

Occasion

Present the necessity and urgency of the problem or question.

What was the trigger for the transformation? WHY did it happen?

Connect with the audience by describing an easily understandable example related to everyday work.

A suitable picture

Licence-free images are available in various online databases, such as https://pixabay.com/de/ or https://unsplash.com/.

For completeness, remember to indicate the source

Solution

Describe transformative principle in the solution idea.

WHAT does the solution principle look like? And in which formats can this principle be implemented in a target group-specific way?

Explain to the audience how they can recognise the solution using an easy-to-understand example related to their everyday work.

A suitable picture

Licence-free images are available in various online databases, such as https://pixabay.com/de/ or https://unsplash.com/.

For completeness, remember to indicate the source

Value

Name the benefits and added value of the solution.

What is different in everyday life because of the transformation? WHAT is it for? What changes as a result?

Explain to the audience how the solution can work using an easy-to-understand example related to everyday work.

A suitable picture

Royalty-free images are available in various online databases, such as https://pixabay.com/de/

For completeness, remember to indicate the source

Dramatic turnaround

Name a significant event that could endanger the idea.

What was the most significant obstacle along the way?

Emotionally illustrate the event to the audience in words and, if necessary, metaphors.

A suitable picture

Licence-free images are available in various online databases, such as https://pixabay.com/de/ or https://unsplash.com/.

For completeness, remember to indicate the source

Great good end

Illustrate how the obstacle can be overcome
.

How was the obstacle taken into account and how is it dealt with?

To make the audience understand how the solution involves not only one but also the other.

A suitable picture

Licence-free images are available in various online databases, such as https://pixabay.com/de/ or https://unsplash.com/.

For completeness, remember to indicate the source

Next steps

A call to the audience to help shape the transformation.

What's next to be able to really implement the transformative idea?

Give the audience concrete points on how they can be part of the transformation.

A suitable picture

Licence-free images are available in various online databases, such as https://pixabay.com/de/ or https://unsplash.com/.

For completeness, remember to indicate the source