Reflections from Practice.

Does the facilitator of a scenario development activity need substantive knowledge of the focal topic?

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In this short paper, we provide guidelines for the facilitation of scenario thinking interventions in organizations. Our focus is on common situations where the scenario development facilitator has little or no knowledge of the substantive topic of the scenarios. Should the facilitator avoid such situations? Should he/she spend time reading around the topic area? Or, is little or no preparation a sensible starting point to achieve a strong subsequent set of scenarios? The paper deals with two settings for scenario interventions: i) interventions within a single organisation, and ii) interventions in a multi-agency context.

1. Working within a single host organization

Within a single organisation, the key is to get as much (preferably paid) access as possible before the scenario workshop – within which the scenarios are to be developed. One way to achieve this is to interview the key stakeholders about issues that concern them. Our preferred way in to this topic is to interview each stakeholder individually with the "seven questions" (see Cairns and Wright, 2018, p184). These questions reveal the topic areas that are plausible "issues of concern" for subsequent focussed scenario development. For example, in a recent intervention within a European energy company there was a general pre-interview feeling expressed by the twelve most-senior managers that scenarios around the energy transition - from carbon-based fuels to renewables - would be a sensible starting point for the first use of the scenario method within the organisation. The interview yield from the "seven questions" revealed many areas of concern that, within them, included the energy transition from oil and gas to other, perhaps more "green", energy technologies. Other major concerns included the skill sets needed within the organization for the future, the geographical spread of the firm's activities, the location of the firm's head office, and the focus of the organization's current energy activities. The individual interview yields were made anonymous and then quotations across the interviews were grouped and then presented, within an Interview Report (see Cairns and Wright, 2018, p186), as viewpoints on each of the twenty areas of concern. Sometimes the twelve viewpoints were in (nuanced) agreement and sometimes the viewpoints diverged. From these concerns, we identified four focal "issues of concern" that could, plausibly, be investigated further using scenario development and analysis. We presented both the interview yield report and, what we saw as, the four potential scenario development options back to the senior leadership team of the organization. After some discussion, the one on the "energy transition" was selected. As a by-product of this overall activity, we become both more familiar with energy issues and with the current tensions within the organization. No prior reading needed. All this set us up well for the subsequent scenario workshop – in that we were able to have sensible conversations with participants about issues that were of informal concern.

As for the scenario intervention itself, the exercise took place over a two-day period, with a group evening meal set between the two days. On the first day of the scenario development workshop, we presented the issue of concern to the 20 participants and asked them each to generate about 12 individual post-its that each contained a single driving force (see Cairns and Wright, 2018, chapter 2, for a detailed step-by-step account of the "intuitive logics scenario method). Each driving force was prompted by the use of the PESTEL mnemonic - political, economic, social, technological, environmental and legal. Nearly all the elicited driving forces were viewed as uncertainties rather than being seen as pre-determined and these were indicated by use of the starting phrases of "degree of …", "level of …", "extent of …", etc. Once the circa 250 driving forces were elicited and written down using a flip-chart marker on individual post-its, these were stuck onto the wall of the room and then each one, in turn, was explained to the whole group by the originator. In this way, of course, we as the less-knowledgeable participants also developed our knowledge of issues in the energy transition. The next stage of the scenario development process involved participants clustering these driving forces to simplify the 250 pieces of knowledge by finding causal connections between the 250. About 10 clusters were identified as being, to a degree, independent of one-another. Once again, the process involved explanation of the clusters to all participants by the originators. Our task, as facilitators, was to understand and then challenge, if necessary, the logic of an in-development cluster. And, for each of the further step-by-step activities that resulted in the final scenario storylines, we also required explanations from those responsible for a particular step. Overall, as the scenarios were developed, the constituent components were explained – to both the full set of participants and to us as facilitators.

After the two-day exercise was completed, the scenario storylines were still only part-developed and, of course, only partly comprehensible to us. Fortunately, one individual from within the host organisation was our "scenario-buddy". He was keen to learn about scenario development, especially as one objective of the organisation was to develop an internal capability in scenario thinking. In short, he was able to take the skeleton scenarios that the four teams had developed and add flesh from his substantive knowledge of the energy transition issues and context. Having an "insider" as part of the scenario development effort is a strong plus for a successful activity – especially where that individual (and other individuals who, more generally, simply participate in the scenario development activity) can "shine" in the eyes of the host organisation, through their effort and success. For example, as here, often individuals who are near the top of the hierarchy may be present within the scenario team, informally observing other participants' contributions and, sometimes, noting the presence of potential future leaders of the organisation.

While this account of one scenario project indicates that we, as facilitators, require little or no substantive knowledge of the core topic – the focal issue of concern – there is a need for effective facilitators to be able to *make sense* of what is being discussed and to place the issue within a broader context, that of the macro-PESTEL forces in the world at large. Intra-organizational participants will often display degrees of myopic thinking about the issue, relating every component to what happens within the business and its immediate sphere of engagement and influence. The effective facilitator must be able to relate this narrow context to other areas which demonstrate similar or related characteristics or raise additional factors of possible impact. In short, the active facilitator can utilise common sense and logic to expand, what may be, the homogeneous world-views of scenario development teams sourced from within a single organisation – which are often the participants for an organisation's first adoption of scenario-based forward thinking.

For example, in one project in Australia, we were asked to facilitate a scenario workshop with an organization and its academic collaborators who were exploring the future of autonomous vehicles, particularly their potential impact on road accident casualty numbers. For the group, there was a basic assumption that this number would fall as vehicle autonomy becomes ubiquitous and human error is eliminated from the causal chain. This was perceived to be a predetermined and fairly short-term change. While we had no substantive knowledge of vehicle autonomy and its course of development, we were able to research other factors and so raise additional issue for discussion within the scenario team. Specifically, we identified three key issues, namely: i) there was no regular mandatory vehicle testing in the particular Australian state, ii) the rate of new vehicle acquisitions against the total number in use indicated a 20-year turnover for the entire fleet, and iii) offences for vehicle theft, drink- and, in particular, drug-related driving were increasing. As such, the assumption of short-term benefit and reduced accident statistics as a pre-determined element of the future was posited, by us, as instead being a critical uncertainty within a context of a vehicle population containing a mix of autonomous vehicles and older, less well-driven and maintained, vehicles. As a result, the scenario project team were prompted to consider developing less-than-positive alternative futures and changed their focus from simply considering the technologies of vehicle automation to include issues of driver education and political lobbying for legislative change, and tax-incentives to promote more rapid vehicle renewal.

2. Working within a multi-agency context

In multi-agency or multi-organisation scenario development activities, the problems and issues to do with the extent of facilitator knowledge about the focal topic are somewhat different. The first point to make is that it may well be that there is no obvious "scenario buddy" to pair up with. Also, since the participants – often just one or two from each of the interested organisations – are frequently not being monitored by superiors from within that organisation, it follows that external pressures for continuing involvement may be lessened - especially if the scenario activity is an intensive two-or three-day workshop – or perhaps two or three workshops separated by a window of several weeks. Thus, the context for committed continuous involvement over the life of an extended scenario development activity is lessened in any multi-agency setting. Nevertheless, the involvement of several organisations within the scenario activity can add, positively, to the heterogeneity of opinions and reduce the need for adding further heterogeneity by including the perspectives of "remarkable people" (see Cairns and Wright, 2018, p 159).

While the involvement of participants from multiple organizations may bring advantages of a broader set of perspectives on the focal issue, and more varied consideration of the PESTEL factors, it also presents one key danger. Each of the members will bring with them the "baggage" of their own organization's current activities, focus of attention, business imperatives and vested interests. These may align in some way with the focal issue at hand, but they may also be in conflict with it and, in particular, individual organizational agendas may remain hidden, whether by accident or design. In one project to explore e-government futures in Scotland, we worked with members of a local government from various levels along with representatives from police and fire authorities, the health service and voluntary sector organizations. The agreed focal issue was how to apply new

information and communications technologies (ICTs) to enable "joined up" responses to community needs and requests. While the scenario project appeared to address this agenda at the outset, as a major health crisis of national significance distracted the most senior members, the project flow was disrupted by an individual with a personal agenda of seeking technology investment, not necessarily linked to the community service focus.

We have engaged in a number of inter-organizational collaborations to address what was a pre-agreed and shared focal issue of concern, where the end result has been explicit agreement on an action agenda to be shared among the participants – such that their articulated actions will achieve a common goal (see Cairns and Wright, 2018, Case Study F, pages 227-238). However, where these participants are not senior decision makers within their own organizations, these agenda will often remain as such, with little or no follow-up action as an ongoing collaborative group. Clearly, the facilitators' selection of participants in the scenario development workshop is critical to achieve follow-on decisions.

There is a further nuance to our conclusion about participant selection. From our experiences of multi-agency scenario work, we have come to believe that the facilitators' key input at the earliest possible stage is to enable both the group as a body and the group's members as individuals to establish both a common focal issue of concern that is genuinely shared by all group members and, crucially, to identify whether individual organizational sub-issues and goals are in contradiction to a shared, group-based, overall goal. Any sub-issues must be a part of the main issue whilst also being of direct importance to the individual organization and its decision-making. A key facilitator task is to recognize and explicitly surface and discuss instances where the individual approach to the sub-issue may be at odds with the group deliberation on the focal issue. In the example above, on e-government, while the disruption of the key agenda became apparent to us before completion of the project reports, we failed to take decisive action to direct discussion toward open consideration of the individual's technology agenda. This was made difficult because of the health crisis, which ran on for several months, but hindsight presents the question of whether we could, and should have forcefully pursued the issue. In short, goal conflict must be identified and resolved, otherwise subsequent group-based articulated action to achieve a common goal will be compromised. Where vested interests are in conflict, there is the opportunity to deal with differences, if there is a willingness and openness to do so. However, as outlined above, where individual agendas remain hidden, conflicting priorities will remain and may act to block effective follow-up to the scenario workshops, no matter what good intentions are spoken.

Whether in single- or multi-organizational settings, one key role of the creative and effective facilitator is to challenge the taken-for-granted but bounded assumptions of otherwise sensible and senior individuals. This is something that may be difficult for their subordinates within their own organizations, where such challenges may be viewed as "negative" or deemed "absurd". Externally-sourced facilitation of scenario development workshops is therefore important for single-organization activity that contain a mix of senior and junior participants since outsiders, like us, are prepared, sometimes, to challenge firmly-held viewpoints. Even in multi-agency settings, outside challenge can be necessary. The following example of this comes from February 2016 where, to an audience of 300 senior decision-makers in Australia, we first presented a scenario in which, later in

that year, the UK had voted to leave the EU and Donald Trump had been elected President of the U.S. The narrative was greeted by gales of laughter. However, the question, "Why are you laughing, have I just presented something that is impossible?" was met with initial silence. By contrast, our second scenario narrative of President Hillary Clinton and the UK remaining within the EU was received initially with knowing nods from the audience – the scenario held no surprises to the audience who had not been part of the scenario development process. Only when the causal logic of the first scenario was revealed and understood did the audience begin to view it as plausible future.

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Reference

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