



École de gestion

**TELFER**

School of Management



**Telfer Foresight Leadership Forum**

# **Telfer Foresight Leadership Forum**

## **Report**

### **Workshop # 4**

**February 2 & 3, 2011**

**Adjunct Professor Jack Smith**

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**Centre for Executive Leadership**

## **Summary Record of Workshop #4, February 2-3 2011**

Below is a summary of the main outcomes and lessons learned from the two day workshop held on February 2-3 2011 at Telfer's Centre for Executive Leadership(CEL).

Participants for the program included:

- Health Canada (TFLF member)
- Agriculture and Agri-Food Canada (TFLF member)
- Canadian Food Inspection Agency (TFLF member)
- Fisheries and Oceans Canada ( TFLF member)
- Policy Research Initiative (Guest)
- Telfer (TFLF program coordinators and guest speakers)

The purpose of the two day program is for the participants to peer share, to ask questions and to receive guidance and input from the participants. The focus for this session was on foresight communications and presentation of findings to stakeholders, plus an overview of foresight methods.

Uniquely for this TFLF #4, an External Review committee, consisting of four highly experienced science and technology, and government communications executive experts was provided for the Forum.

The Telfer team for this event consisted of Jack Smith, Glen Bailey and Shirley Wong.

The external experts were: David Holdsworth, Richard Tobin, Peter Daniel, and Nicole Senécal.

A quick summary list of advice from the guest speakers and lessons learned by the group includes:

### **Advice from the Review Committee**

1. Target the audience and state the purpose
2. Know each of the members of the Senior Executive Team and their concerns
3. Be real; do not ignore constraints, risks or the 'dark side'
4. Use stories and anecdotes

### **Lessons Learned**

1. Address change management and culture issues
2. Tell story from the perspective of the listeners, know your audience
3. Focus on outcomes and content, not the process
4. Ground the presentation in the constraints and build the case
5. Convey purpose and sense of urgency (Why action is needed now)
6. Be clear about resources (people and money)
7. Tell anecdotes and use stories
8. Demonstrate the importance/need for a multi-disciplinary and a multi-stakeholder approach
9. The importance of how we work together – within department, within government and with stakeholders
10. Effort (lots) is needed
11. Number the slides!

## Day One

- Telfer led off by explaining that the first day would be a show and review format – a different approach, based upon a coaching and a learning process
- Foresight is gaining ground with rising expectations , but its value is not being fully realized yet
- One reason is the lack of emphasis on top notch communications
- So this session will involve learning through doing and receiving feedback – a sort of simulated or mock process with the Guest Experts playing the role of an executive committee
- It is realized that departments are at different stages in the foresight programs
- Each department presented its program or project and then received both expert commentary and peer feedback

## **TFLF 4 Presentations and Expert Review Comments Summary**

### **1. CFIA Fore-Can Project**

- Clarify investments needed and decisions by CEO and VP
- Need to sharpen vision on shared aspects – not complete picture yet-convergence of actions is fine but vision is still the key
- Culture change tricky – enormous task
- More effective if can address how to get from here to there- could otherwise end up on shelf;
- Good for peers but to ADMs have to focus on outcomes and key decisions on how to manage the foreseeable c rises and how to compete for resources;
- Set context more effectively and clarify where want to go
- Slides too busy- simplify with key messages
- 3 year horizon – when does it end what is the full extent of the shared vision?
- Private sector role not clear
- Point to interim outcomes – anecdotes include for the pitch for new, ongoing \$
- Challenge is to show value of prevention
- Articulate better how foresight can become a vehicle to manage
- Web 2.2 and other ways of keeping connected especially with Senior Management
- Number slides and strengthen common look and feel

## 2. AAFC Growing Forward

- How much does the rationale hang on climate change aspects versus other pressures?
- What is expected to be the biggest challenge and biggest surprise?
- Foresight is a comparatively new policy development instrument – relies heavily on engagement
- Tough sell and surprises are endemic so work hard at clarifying your sales pitch, especially for risk averse organizations like government
- Presentation is process heavy- need more sense of content and value proposition
- Not convinced that you have adequately defined the value and ability to use \$ 6.5 M well
- Where are the provincial agriculture departments?
- What concrete results do you have to show after 2.5 years? Need much more focus
- Reduce process info to one slide
- Want to see the excitement and enthusiasm - water, extreme events, pathogens etc. and the vulnerability of present complacency and narrow thinking
- Shift in accountability – where is \$ and how will it be grounded in governance mechanisms?
- Good that you got \$ 6.5 m without scenarios – so now what are they?
- So instead have ten observations and their implications on current programs
- Need to sell the message not the technology of foresight;
- Lot of potential to bring out strong messages from stakeholders. Tell stories
- Go back to the record of meetings and mine for anecdotes
- From CFIA show collaboration in five domains which speak to ADM priorities. This will grab their attention
- Was presentation an information update are their decisions? You need to clarify
- Put up front the purpose of the presentation. Be explicit.
- Story telling is integral to Foresight
- CFIA – professional actors used- worked

- Story stuff interesting but scientists might need more structure
- Not every story will do – needs to be real e.g. water and farmers and illustrate the key message
- AAFC used survey at start and end to ask who is best positioned to deal with climate change shifted onus to multiple actors from government only - more willingness to collaborate.

### 3. Health Canada Process and Results for Decision-Making and Action

- Purpose not very clear at start
- Strong list of collaborators – might say how selected and why
- Social determinants of health as key drivers- important to highlight
- Good list , but useful to have a story to highlight some details- a few
- 4 scenarios with 2 drivers – what does it leave out? Does it provide focus?
- Deepen with real stories – too conceptual now
- 3 emergent areas – need to define use of emergent
- Changing assumptions –seems more explanatory
- Diagrams on new S&T somewhat confusing
- Where are the provinces? They are responsible for healthcare
- How does health accord mesh with other opportunities?
- Seems directed more to explain foresight than to address priority issues
- Not yet clear where you are in a complex choice and evolutionary process
- What about dark side of S&T? E.g. Couch potatoes, drugs reliance; false positives, pros and cons of S&T prospects
- Good story about future of health system, but story is incomplete
- Absence of barriers – ethical and legal aspects
- What has been reaction? Were you asked to look at key drivers such as aging, obesity, etc.?
- Went quickly to content-that is OK

- How does this relate to Romanow & Kirby reports?
- Is optimism justified - little focus on constraints
- Task is overwhelming so why this approach – i.e. why is it different?
- Is there pain here or a crisis? - not evident in the presentation
- Frame the question more forcefully - moving to tipping point
- Clarify terminology ---ICT/R&D/S&T mixed up
- Is it a compelling story re future? Link to the health accord
- Avoid collective solution as only intervention as it will be seen as government intervention. Use foresight analysis to let things emerge rather than choice
- Bring out the critically important transformative technologies

#### 4. Fisheries and Oceans Canada

- Good one page intro to foresight
- Link to Department and PCO story line
- Why now- DFO mandate growing, unique good discussion
- Lingering too long on why foresight – good for a couple of points
- Who else is doing it in our allies – good reference
- Next generation strategic plan development – too abstract- use examples
- Boldly go forward; the key need is a more concrete roadmap of what you believe to be practical
- Common themes – use examples again- show how it can address key issues
- Cone of plausibility: use DFO anecdotes = more forceful examples
- Oceans Management and S&T: show how can add value to both sides –this is the value proposition
- Why oceans now; challenges OK, but need to show how foresight can address them on same slide

- Process- how, systematic, sequence etc. Link your proposed actions to the challenges process
- Outcomes need to be recast - less generic
- The impact of the risks needs more description
- Project description – needs time line and cost in stages
- More detail on global experiences; useful to indicate where others are
- Don't sell foresight - sell value of outcomes to address the key issues
- Suggest use of 2 pg strategic briefing notes to create interest = like a lure
- Show the cross pollination and create the sense of urgency and why need it now
- Need to ask for adequate funds to engage necessary stakeholders
- Less time on process and theory
- Bring reality to foreground with concrete examples
- Too tentative – worth more than \$10 K
- Number slides; ditch the transitions
- Too long explanation on foresight
- Strengthen sense of urgency- i.e. Cabinet review - need to go faster and focus so ready in 2012 with concrete ideas
- Focus on only one topic more – seems too broad right now

### **Day One Wrap Up**

**The Telfer team plus guest experts summarized the day's key lessons and asked the Leaders to share their impressions as well. In point form these included:**

- Change management demands focused communications;
- ADM perspective – tell story they need to hear instead of what you want to tell
- Retool messages for different audiences
- Avoid focus on Foresight process – focus on outcomes

- Surface constraints and show appreciation for two sides of choices
- Open with clear purpose and hooks for today (urgency, costs or risks of delay)
- Be realistic and up front with resource requirements
- Use technology examples to illustrate what is coming
- Structure events with face to face interchanges and include diversity of disciplines and stakeholders;
- Ensure how we work together is addressed
- Tell ADMs the purpose, the content, the value and what you expect from them
- Less on process –shorten methods- too S&T and more on policy and program issues
- Research your audience in advance -target their issues and anticipate ugly questions;
- Be real - show you can address both sides and anticipate tough issues with trade-offs
- Use stories, scenarios and anecdotes

## **Day 2**

- Consisted of three sessions with a review of some changes being proposed by the presenters from day 1.
- Building on the theme of executive communications, guest experts Peter Daniel and Alvin Cader

### **Peter Daniel & Alvin Cader: Powerful Executive Communication- the Art of Persuasion**

- Conciseness as essence of journalism
- Herman Ebbinghaus 1850-1909 father of learning-forgetting curve
- 30 min=60% retention; 24 hrs 40% ; 1week =10%
- Tell what you are going to say; say it; say it again; tell them what you said
- Repeat, repeat – focus-focus on key 10%
- Anecdotes stick – when they connect to your material

- E.g. CFIA presentation ‘buried headlines’ & underplayed key issue of national security issue
- Communication ; 7% of received is verbal; para verbal-how use voice pitch; volume, tone 38%; body language 55%- perceiving two ways
- Being in sync is key – with yourself first
- **Planning** is important; know your stuff and your position; your or their objectives versus your and their objective; need to show conviction
- Need to know **audience** – who they are what motivates them and what is likely to happen – what do they know and not know and what need to know – so do some phoning , do your homework, cultivate a network,
- **Setting**; preparedness, what happens when your brief gets hijacked; interruptions; Blackberry etiquette e.g. on silent and leave room if need to deal with an issue; leaders do not want distractions for decision meetings
- **Focus**; sharp. at start, on cover slide, get to the point first with a strong lead, no list – set context with verbal focus on key purpose speaking over the title slide; audience will recall start, end and maybe middle if it supports start and end
- Top three dirty Q answers should be in briefing; play to the pain and don’t bury your head, short answers
- Inverted pyramid – no time so put must have info (30 seconds) first. then helpful , then beneficial
- Contingency for ¼ time – main stuff in first x minutes; plan a, b , c and what if no av working
- Writing for the ear- one thought per sentence- signal words & phrases
- PPT slides support- time verify – you go to the focus and if you have a complicated slide, fade out after 5 seconds and the go the top point and answer so what – use a 10% bumper sticker
- No outline menu or laundry list; less is more
- 7 points max per slide use 24 -28 font size plus 36 for title; grammar latitude

- Number slides; 1 per minute, use colour for effect with a strategy; simple graphics, numerical bullets, use only one movement in a graph
- Knock out anything that distracts from your most critical message;
- Delivery: connect in first 60 seconds; eye contacts, voice mechanics- pacing, cadence, inflecting, around key messages pause it, no dead air nor motor through; 100 words a minute; conscious projection, awareness of gestures and posture; on all the time, hands visible – maybe holding pen; attitude is evident. be an active listener – answer questions by anticipating most
- Stand on right side

***Following the first presentation, there was a plenary discussion about how the previous day's presentations could be improved. First the Departments indicated what they thought would be most useful to change - then the experts offered critiques and advice:***

- **DFO**
  - why oceans why now – 3 oceans with Arctic a major new element and use fewer words; better diagrams
  - **Expert comments re DFO:** first minute OK; slide 2 add risk of inaction and urgency, put definition of foresight on title slide and ditch cone slide as it is too complicated
- **CFIA**
  - animal health challenges and rate of change
  - focal issue was how to develop emergency management system; outcome: shared vision with industry
  - pillars have to include economic and environments
  - **Expert comments re CFIA**
    - too quick to slide 2 – use title more effectively because they are focused on you
    - – too much time on history – bring forward the world is changing, and put what next at bottom; question- fewer words; no in order to, Sars etc (remove what next)
    - visuals work – talk to uncertainty – world is changing is bumper sticker; diagram and vision is healthy animals healthy future
    - origin and national security significance – want to have healthy animals; too many words, more graphic clarity; world is changing up front
- **AAFC**
  - focus question up front ; re climate change impacts; then process description, then scenarios diagram – too much text; then timeline 4 workshops – better to just say had 4 and outcomes were; 42 robust actions to 10, themed outcomes

- **Expert comments re AAFC** -Opening Question use a reveal ; number slides; simplify scenarios titles; use photos if necessary an relevant; go next to the 10 and use bullets not #; If truncated SLOW DOWN and return to top and key slide speak to.
- **HC**
  - focus on current situation , 4 key challenges and ditch team task slide
  - **Expert comments re HC:** linger longer on slide 1. Refer to bumper sticker on slide 2 and add font size
    - Remember What, Would, and Will - use less words more pictures; conveyor concept good but buried in words;
    - system diagram – new emphasis on wellness is not distinctive; too many shapes & colours

**The final element of TFLF 4 was an Overview of Foresight Methods presentation by the Telfer team – see slide deck in the web site reference. Key topics and methods addressed in this presentation-discussion included;**

- Review of definitions of foresight;
- Scenarios development;
- Technology Roadmapping
- Delphi
- Megatrend Analysis
- Trend Extrapolation
- Key Technologies
- Expert Panels

Under scenarios for example there was a slide that outlined several different ways of structuring scenarios and references were made to the strong literature sources for scenarios and to a distributed paper: *Science & Technology Foresight Baker's Dozen – A Pocket Primer of Comparative & Combined Foresight Methods*; published in *Foresight Volume 13 Issue 2, 2011*.

# Alternative Scenario Framing Bases

Scenario Method	Basics – Key Characteristics	Notes
1. Axial -2 (AX2)	2 key uncertainties produce 4 scenarios	Can be limiting – requires careful attention in choice of drivers
2. Multiple Axial-2 (MA2)	Select best 5-6 from total of about 8-10 generated by 4 -5 sets of axial -2	Opens up process but also demands care in selection – requires more time, imaginative input
3. Axial -3 (AX3)	3 key uncertainties lead to 8 scenarios	Good for complex 3 dimensional, but 8 scenarios can be confusing with subtleties
4. Axial -4 (AX4)	4 axes enable many scenarios	Useful for more exhaustive, analytical and complex work but requires more evidence
5. Thematic Policy Challenges (TPC)	Unlimited range of options, but themes must be broad, resonant	Good link to key receptors in policy, leaders
6. Diverse Dominant Drivers (DDD)	Typically derived from STEEP drivers where critical challenges frame diverse-divergent futures	Allows major institutional interests to be reflected
7. Normative Alternative Preferences (NAP)	Futures we want or can like, selecting for desirable choices and impacts	Inspires creativity but also encourages bias so needs a challenge function
8. Dichotomous Thematic Alternatives (DTA)	Where opposing end states are clearly contrasted – e.g. what is best and worst that can happen.	Premised on readiness for opposed outcomes-may require organizational courage
9. Constituent Element Forces (CEF)	Where scenarios are developed from the bottom up in pieces and assembled into coherent stories	Requires a skilled foresight team – but can be quite effective
10. Computational Probability Algorithms (CPA)	Number of alternatives defined by system capacity	Must have strong computational models and teams – or funds to acquire



## Scenario Planning References

Reference Title	Author/s	Source
Foresight; The Art and Science of Anticipating the Future	Loveridge Denis	ISBN 978-0-415-39815-2; by Routledge 08/11/2008
The Art of the Long View	Schwartz Peter.	ISBN 0-385-26732-0 New York, NY: Doubleday Currency, 1991;
Inevitable Surprises	Schwartz Peter	ISBN 1-59240-027-2; by Gotham Books, Penguin, New York 2003
Scenarios: The Art of Strategic Conversation	Van Der Heijden, Kees	New York, NY: Wiley, 1996.
Scenarios: Uncharted Waters Ahead, and Scenarios: Shooting the Rapids.	Wack, Pierre.	Harvard Business Review, v.63, n.5, p.72-89, Sept/Oct. 1985; and Harvard Business Review, v.63, n.6, p.139-150, Nov/Dec 1985.
Creating Better Futures	Ogilvy James	ISBN 0-19-514811-5, New York, N.Y. Oxford University Press, 2002
Changing The Winds- Scenarios for People Who Want to Change the World	Kahane Adam	Whole Earth, Spring 1999, pg 82ff.
From My Perspective: Scenario Planning;	Coates Joseph	<a href="#">Technological Forecasting and Social Change; Volume 65, Issue 1</a> , September 2000, Pages 115-123;
<a href="#">Scenario Planning Bibliography</a>	Van der Heijden Kees	<a href="#">@ Global Business Network . www.gbn.org/scenarios</a> ;
Scenario Planning – Managing for the Future	Ringland Gill	ISBN 0-471-97790-X, Wiley, New York 1998
Scenario Planning Handbook	Ralston Bill and Wilson Ian	ISBN 13-978-0-324-31285-0 Thomson Higher Education, Mason, Ohio 2006