



ASIA AND THE PACIFIC

Regional  
Innovation Centre



# PREPARING TO RUN A SENSEMAKING WORKSHOP

what is it, why do it, how to prepare for it?

# About this Guide

## What is it?

This Preparation Guide is created by UNDP Asia-Pacific Regional Innovation Centre to help teams decide if they should run a Sensemaking workshop, and how to prepare for it.

## Who can use it?

The team considering to run this multi-day workshop (which includes the senior management leading the process). It contains handy checklists, definitions, event formats and templates that you can use to run your own Sensemaking sessions!

## Complimentary resources

The Preparation Guide is intended to be used in conjunction with:

- *[UNDP Sensemaking Workshop Facilitator Guide](#)*, which breaks down how to run a session in more detail (designed to be used by the Facilitator + session focal team should you choose to go forward with running the workshop).

## Acknowledgements

*UNDP Portfolio Sensemaking and Acceleration Protocol* was developed by Chôra Foundation (previously known as Axilo) for UNDP Asia-Pacific Regional Innovation Centre in 2019.



## Contact Us

If you have any question about this guide or process, please email: [brh.ric@undp.org](mailto:brh.ric@undp.org)

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## SENSEMAKING EXPLAINED

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# What is Sensemaking?



**Sensemaking is an activity and a process that extracts insights, induces learning and creates meaning from experience.**

*UNDP Portfolio Acceleration and Sensemaking Protocol*

Sensemaking as a process enables a team to reflect on their current portfolio of work, with the intention to maximize **impact** and **effectiveness** of their work by asking:

- **Why run this particular set of projects at this point in time?**
- **Are these projects relevant and coherent to the (current and/or emergent) needs of the industry or country or government(s)?**
- **How can we do more of with our limited resources on the ground (e.g. funding, human resources, projects, relationships)?**

## We do this by:



**Observing & making sense** of an existing portfolio of work (using a subset of 10-12 projects being run within your team)



**Extracting insights & intelligence** from the presented projects on their coherence and alignment with the organization's expressed intent, and



**Creating an action plan** using those insights and intelligence to change how we work so that we can accelerate the potential impact of the organization's current and pipeline portfolio.

# Why Sensemaking? (Some of the main reasons)



**Increase impact** by accelerating the effects of your current portfolio and optimizing what you have already invested on the ground. This entails identifying opportunities to efficiently and effectively utilize assets across current projects e.g. sharing of successful methodologies/ processes, donor resources, human resources, capabilities, partnerships, social networks.



**Transition** to working using portfolio approaches by identifying ways to design projects to be more cross-cutting and intersectional.



**Reflect** on how your team's portfolio fits with the organization's broader intent. This will help inform thinking about what you might want to keep, drop, add for your next strategic planning or project development cycle or as part of a mid-term review.



**Identify** (technically, operationally, interpersonally) what your team is doing well, where your organization holds comparative advantage, where you need to improve, new capabilities you might need to invest in, and potential future opportunities.



**Host** a collective strategic conversation in the team that goes beyond senior management and team leaders, by bringing a broader group of colleagues together. This also encourages collective ownership of work.



**Shift** from a compliance and reporting-heavy organization to a user-centric, learning organization.



**Invest** in the capability development of staff specifically in the areas of facilitation, active listening, abstraction, identifying patterns, articulating and presenting strategic arguments.



**Support** the onboarding of new senior management, giving them a thorough introduction to the team culture and portfolio of activities.

# Combining Sensemaking with Futures thinking

Your Sensemaking workshop can also be complemented with additional 'Futures Informed' session(s). We would recommend this if, for instance, you wish to:

- 'Stress test' how your current portfolio handles a futures analysis of emerging external trends or risks – in its current design considerations and/or its flexibility to be able to adapt and respond to such shifts
- Seek support in identifying potential opportunity spaces (technical/programmatic, partnership, business or funding models, etc.)
- Explore ways to generally design in more proactiveness vs. reactiveness into your team/office's ways of working (technically, operationally)

A combined Sensemaking and Futures thinking workshop process can be of particular support to the project development process. For this we recommend starting early in the process:

- Undertaking Futures Analysis to inform the industry/country assessment, development of the Theory of Change, as well as identification of risk
- Undertaking Sensemaking for prioritization and decision making for the next project development, and reflection of lessons learned from the past project development cycle

# What is involved in a Sensemaking Workshop?



## Pre-workshop

### Articulate your Identity

What role does your team see itself playing in the industry/country?

### State your Intent

What transformative effects are you seeking to create there?

### Set Learning Objectives

Why are you doing this workshop at this time?

What do you want to learn about your current portfolio? Use the above to select a subset of 10-12 projects from the team portfolio to learn from.

### Handy Templates:

[Statement of Intent template](#)

[Project presentation template](#)



## During Workshop

### Listen to Project Presentations

The 10-12 projects are individually presented following a common template unpacking (a) What is the issue, and why is your organization doing something about it (b) How is our project addressing the issue and (c) What makes up the project. We also reflect on this project as part of wider team portfolio. One presenter per project.

### Map Thematic Windows

The Windows represent different strategic topics for which the team is listening to map patterns and insights from the presentations (e.g., Whose needs and what needs are the projects addressing, What type of impact are the projects having and where in the system is the impact taking place). There are usually 4-5 Windows. There is one Mapper per Window.

### Make Sense - Abstraction & Synthesis

Extrapolating the patterns and insights noted to the



## Post-Workshop

### Finalize the Intelligence Report

A small team processes workshop outputs, identifies key insights, and develops the final report with proposed action plans of next steps.

### Build Momentum and Support within the Office

Ensure the work is shared and discussed with broader set of colleagues to get their buy-in and build the momentum needed to accomplish the action plan.

预览已结束，完整报告链接和二维码如下：

[https://www.yunbaogao.cn/report/index/report?reportId=5\\_11402](https://www.yunbaogao.cn/report/index/report?reportId=5_11402)

