



Foresight Infused Strategy Development

A How-To Guide for Using Foresight in Practice

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My Foresight Journey

I was fortunate to be able to use foresight in the strategy processes of two universities – Swinburne University from 1999 to 2005 and at Victoria University (VU) from 2005 to 2007. My foresight journey is inextricably linked to the introduction of foresight at Swinburne and by the time I left to go to VU I was committed to the use of foresight in strategy development.

More than that though, I realised foresight was part of my worldview. I now can't imagine doing a job where I can't use foresight. This chapter gives you my story, how I learned about foresight, how I have used it and some reflections on my journey to date.

Learning about Foresight at Swinburne

I was called into the Vice-Chancellor's office one day in late 1998 – those of you who work in universities will know that this is always an interesting experience! At the time, I was working in the Higher Education Division looking after strategic, student and resource planning, but I was struggling with the University's approach to planning. You know what it's like: big document, lots of actions, lots of key performance indicators and a rigid process for reviewing it each year. It was a compliance exercise and seemed to have little to do with setting and achieving strategy.

I had started to talk about my misgivings but nothing much was happening – or so I thought. The Higher Education Division at the time was also under review, since there was a general perception that the Divisional Office had too many administrative staff and was diverting resources away from teaching and research. This remains a common complaint in universities today!

I didn't know that at the time that the Vice-Chancellor and one of the Vice-Presidents had been at a British Council seminar on foresight in the United Kingdom. They saw its value and decided to bring foresight to Swinburne as part of the wider organisational changes being planned. My visit to the Vice-Chancellor's office was part of those changes. The conversation went something like this:

VC: We are re-structuring the Higher Education Divisional Office, and one of the jobs that will disappear is yours.

Maree (thinking): Okay, I knew that was coming. But, I think I'm okay.

VC: We are creating a new central planning office, and we would like you to manage it.

Maree: Okay, that would be great. Thank you.

VC: And we would like you to do foresight...

Maree (thinking): What on earth is foresight?

Maree: Okay, that sounds interesting. Do any other universities in Australia do foresight?

VC: No.

Maree: Okay, when do I start?

I went back to my office and looked up foresight on Google. My foresight journey had begun.

What on Earth Was I Doing?

I had achieved one thing – we could now change the way we did planning. But I had no idea what this foresight thing was, no idea about how it would be useful in planning or how to go about integrating it into a strategic planning process. I was also going to have a new boss – another interesting experience. This would be my fourth job in eight years at Swinburne and while I was looking forward to the change, I was anxious about how on earth I could make foresight a reality when I knew so little about it. As an Enneagram Type 5, appearing competent in public is important to me so I searched out as much information as I could. If I was going to make sense to others, I had to at least have a reasonable understanding of what I was talking about.

The search was productive. While there was no other formal foresight program in an Australian university, many had used scenario thinking on an ad hoc basis. I began to gather a portfolio of information and ideas and started making contact with people online. I moved to my new boss's unit in early 1999 and we worked on how to implement a foresight program at Swinburne.

Now, I was to discover that my new boss and the Vice-Chancellor knew even less about the detail of foresight than I did, so my anxiety grew. I kept doing web searches, reading books, trying to find people who knew about foresight, looking frantically for anything that might help. I began to put together a paper for our planning committee about how we might move forward with a new planning framework that incorporated foresight. I decided that scenario thinking sounded like a good tool for us to use and suggested we involve staff in the process by getting them to participate in a foresight network. So far, so good.

I then discovered by accident that Richard Slaughter was coming to Swinburne to set up the Australian Foresight Institute. It is a characteristic of universities that I found this out from an external source, but when I mentioned it to my boss, he was happy to confirm it. The anxiety lessened a little, knowing there would be at least one person at Swinburne who really knew what foresight was all about.

Implementation Begins

This diagram gave us a framework for our role in the University, how we were going to demonstrate value, as well as identifying what our outputs would be – this was a top level framework, the next job was to work on the detail.

A New Planning Framework

The University's strategic plan was due for review in 2000 so we had the opportunity to use the new planning framework that was underpinned by foresight. At the end of 2000, we produced a single page Statement of Direction 2010 that described the sort of organisation that Swinburne wanted to be and its defining characteristics in 2010. We also had several enabling plans to support the statement but the big, glossy plan was no more.

The Statement was our first foresight publication although it was not labelled as that and had not emerged from a university wide foresight process. The major benefit of the Statement was that it shifted the planning frame of reference out to ten years rather than the previous three to five years, and we began to see a corresponding shift in the thinking timeframe of staff. I was proud of this statement. Instead of asking people to read a conventional plan, we had a clear and concise statement of our preferred future and how we planned to get there on one page.

Horizon 20 Pilot Scenarios Project

We ran the Horizon 20 scenario process with a small group of staff including the Foresight Network, with senior managers attending at the beginning and the end of the workshop. These managers were invited to attend the two days of the workshop as their diaries permitted, but few took up that invitation.

The staff involved in this first workshop were enthusiastic in their response to the experience, but the managers were perplexed about the purpose and outcomes, and some were openly aggressive about how we were in their view, wasting their and our time. My first indication of the power of experiencing a foresight process, of the foresight switch being turned on, happened in the last session when one participant, in response to the managers' critique, said:

I wouldn't expect you to understand the value of the process we have been through over the past two days because you didn't go through that process yourself.

We decided then that we would introduce scenario thinking at the unit level to build an understanding of its value among staff after they had experienced the process. We also decided that the University focused Swinburne Scenarios Project we were thinking about for 2002 needed to focus on senior managers rather than staff as was originally intended. The managers needed to go through the process if the value of foresight as a tool and its outcomes were to be taken seriously and used in our ongoing strategy processes.

Unfortunately, the Foresight Network floundered in 2001 because it was difficult for staff to meet often enough as the entire group and as expected, it was clear that scenarios produced by staff in the Horizons 20 exercise were not regarded as having enough credibility to be used in university planning activities.

We gathered feedback about their perceptions of the Network members' experience and involvement in the Network:

- incredible time deficit was a real issue,
- general interest in both foresight and the professional development opportunity it affords,
- wanting to “make a real difference” as opposed to being window dressing,
- enthusiasm for the idea of foresight, tempered by fatigue and cynicism of 'senior management's motives', and
- wanting to be a part of positive change, both in the organisation and society.

The feedback suggested that the concept of a network was a good one but that it lacked support from managers for people to be involved. It was perhaps an idea whose time had not yet come at Swinburne.

Introducing Foresight

A series of Introduction to Foresight workshops for University units were designed by Joseph Voros and delivered during 2001. These aimed to introduce staff to foresight, its intellectual base in futures studies and how it linked to strategy development. This seminar and a foresight primer became part of the University's online induction process.

We also began to run workshops that were introductions to scenario thinking and involved preparing what we called ‘learning scenarios’. The workshops were not intended to produce scenarios which could be used, but rather were intended to provide staff with the experience of using scenario thinking as a way of thinking about the future. Our learnings from these workshops resulted in a series of three workshops being developed and refined: Learning Scenarios, an introduction to scenario thinking; Exploratory Scenarios, developing scenarios around a particular issue; and Strategic Implications, a follow-on from Exploratory Scenarios which considered strategic options.

The outcomes from this initial work were limited, but evaluation indicated that approximately 90% of those attending the first type of workshop would have been happy to use scenario thinking in their own unit planning and commented that the workshop:

- brought into sharper focus the existence and relevance of thinking about ‘plausibilities’,
- explained the practical implications of foresight,
- gave examples that put into practice what needs to happen, and
- gave a good framework for strategic thinking.

These comments sounded like we had met our objectives in running these workshops and gave us hope that the foresight message was spreading.

We also produced monthly email Foresight Snippets which contained items of interesting, challenging and sometimes weird information that might or might not have been directly relevant to Swinburne. The Snippets focused on the broad social environment while *prospect*, the quarterly Foresight Bulletin, provided information about education related developments and futures work. *prospect* was focused

around the University's five strategic themes and developments in each of these broad areas. Both the Snippets and *prospect* were designed to be conversation starters for ongoing strategic conversations.

A reader survey of the Foresight Snippets indicated that 74% of readers found them useful and informative, with 38% of readers seeking more futures oriented items. *prospect* was used in the development of one of the strategic plans for The Entrepreneurial University strategic theme. The Foresight Seminars were successful, with 100% of attendees indicating they now understood the concept, 95% wanting to find out more, and approximately 85% willing to use it in their unit planning.

I described our implementation process like this (Conway 2001):

Our approach has been to describe foresight as a process, best understood by experiencing it. We are focusing on one methodology to ensure a simple framework for implementation and understanding. We have a five-year plan to embed scenario planning in the University which may be optimistic, but our initial, limited efforts have been received positively by participants.

This sounded like we knew what we were doing and that there was an accepted process. Then I explained the implementation context:

The introduction of foresight into [Swinburne's] planning processes at a time of considerable organisational and cultural change is problematic, not only because it is yet one more change staff have to consider, but also because it bears little overt relationship yet to the day-to-day work of individual units and benefits cannot be quantitatively measured. We are therefore operating in an environment where skepticism about the value of foresight in general ... is high, but where there is, mostly, a commensurately high degree of tolerance until the results are known.

I don't think the situation we found ourselves in when we were introducing foresight would be that different to what organisations are facing now. Details will differ but what we did and what you will be doing is working to integrate a new approach into an existing strategy process in an organisation that is already changing in significant ways. You will be asking people to challenge their assumptions about the future as well as deal with what's going on in the present. No one will thank you for that. In hindsight though, I can say that while challenging for me as a foresight novice, the experience helped me learn how best to introduce foresight into an organisation and to see firsthand what happens when the foresight switch is turned on.

During 2002, Joe left the Unit to work as an academic with Richard Slaughter in the Swinburne foresight program. Marcus Barber took his place as the Strategic Foresight Analyst so I still had a partner in foresight!

Organisational Politics

During all this activity, I was naively unaware about the depth of organisational politics that would ultimately result in the demise of foresight at the university. My boss was not liked by other senior managers and they may have had good reasons for that. My experience though was working with

someone who trusted me to get on with the job and was always available to have a conversation in which I was both challenged and supported. I was to discover that because of their dislike of my boss, these very smart people decided at the outset that this foresight thing was not going to succeed. They would never give it a chance.

I now understand that their resistance wasn't necessarily because they thought using foresight was a bad idea. Rather they decided that they would not support it because they didn't like my boss and had not been involved in the decision to introduce foresight (although not being involved in decision making was not unusual at the time). I learned all this in subsequent conversations with these managers, with whom I had always worked well in the past but with whom my relationship deteriorated as I worked hard to use foresight at Swinburne.

Their resistance ranged from jokes about the word foresight, passive refusal to be involved, being told by a Pro Vice-Chancellor that she was only talking to me out of goodwill and that I should look for another job because foresight wasn't going to succeed, to being told that when I worked in the faculties everyone liked and respected me but people no longer trusted me and didn't understand why I was doing what I was doing. I did have one smug moment however. After Joe and I had delivered a presentation on foresight at Swinburne to the annual meeting with the federal government education department, a Pro Vice-Chancellor announced that she saw no value in foresight and that it had no connection to her day to day work. The Vice-Chancellor remained silent but to my delight, the government departmental secretary liked it so much he invited us to present to his managers group in Canberra.

Now I understand why they reacted like this. In these early days though, I had no idea of this danger lurking beneath the organisational surface, and what I now see as my naivety at understanding organisational politics didn't help me grasp the reality that was all around me. Fortunately, there were many other people at the University who were more open and more willing to tolerate using foresight to see if there was value for Swinburne.

A New Leader: Killing Foresight Softly

That a new Vice-Chancellor would arrive at Swinburne at some stage in 2004 was known for some time. One of my responses to this was to develop a 'convince the new VC' strategy around the value of foresight as a strategy development tool. We did a five-year review of foresight at Swinburne which reminded us of how far we had come since 1999 and how close we were to embedding foresight into our strategy development.

Within months of the new Vice-Chancellor arriving however, it was clear he wasn't interested, and his lack of interest was perhaps more obvious than that of the senior managers. This was a closed mind I was dealing with, someone who apparently knew little about using foresight and because it appeared not to fit his worldview or his plan for Swinburne, there was no engagement. None. I was talking to the proverbial brick wall. He may of course recall this time differently and instead simply saw me as someone with organisational baggage he could do without. And that's fair enough.

Even as I was making what turned out to be a last desperate pitch, the following indicators that foresight was doomed were clear:

- the swiftness with which some senior managers called for the removal of my boss from his position (I have no idea what they said about my role but can imagine!),
- the removal of the term foresight from all planning documentation, including removal of associated terminology such as environmental scanning,
- initial agreement to use inclusive approaches such as surveying staff about their views of the future of Swinburne prior to strategy being developed, that turned into the Vice-Chancellor effectively doing my job for me by running the planning process himself,
- reactions to my suggestions that the Vice-Chancellor might like to read our scanning reports to inform his thinking about future options turned out to be one of those ‘oops’ moments when he responded with words along the lines of ‘I don’t need anything like that to inform my thinking’, and
- his review of the University Planning Framework that eliminated all foresight elements.

It eventually dawned on me that my commitment to using foresight approaches in my work was not shared by the new Vice-Chancellor and I had to leave Swinburne. I have always believed that I wanted to leave a job before someone told me I’ve passed my use-by date and I could now see very clear signs. I proposed that over time I move out of the Director position so the Vice-Chancellor could implement the new framework without me nagging him about foresight. His proposed review of the planning unit would also be easier for him to do if I wasn’t the Director. I moved to a new position on the unstated understanding that I would leave Swinburne as soon as was reasonable, which I serendipitously did within a few months.

At Victoria University

I presented foresight up front when I applied for my job at Victoria University and to their credit they indicated that while they didn’t really understand what it was, they were willing to give it a go. I was more cautious here, introducing foresight in different ways and operating for some time in what I call stealth mode, trying to use foresight without anyone noticing. I did scenario workshops and started to work with units on scanning. A Strategic Analyst was employed at the same time as me to help with the scanning but ended up being immersed in data analysis. Despite my efforts, foresight falling of the priority list turned out to be the hallmark of my time at VU.

After working with departments, I ran a university wide scenario thinking workshop in 2007. It was open to all staff, designed as a taster, an introduction to foresight. There was strong attendance and the feedback was good. I also helped the VU Futures team with environmental scanning – this project was set up shortly after the workshop and I continued to work with the team after I had started Thinking Futures. This group of people were smart, open thinkers and their strategic scans were some of the best I’ve seen. The project disappeared when this Vice-Chancellor left unfortunately, another example of

the fragility of foresight work that is not well embedded in an organisation and dependent on individuals for survival.

My role here was similar to that at Swinburne so the challenge of integrating foresight while balancing strategic planning, government reporting, quality management and government audits, student surveys, data analysis and reporting, managing a wonderful group of 20 staff and a unit restructure was very familiar. It eventually proved too much for me though. I decided that I'd have to leave VU and the best boss I think I've had if I was to pursue using foresight full-time.

When I said this to the Vice-Chancellor finally, she told me I had to stay until the end of the year and finish the things I'd started. She told my boss to do whatever it took. This was a first since you are usually just waved goodbye when you say you are resigning from a university job. Mouth agape, I went part-time and set up Thinking Futures while helping the VU Futures team.

Some Reflections

During my foresight journey I came to realise that one of the biggest gaps in our political frameworks, in our social norms and assumptions about the future and in how organisations develop strategy is the capacity to think in a deeper, more reflective, meaningful and systematic way about the future. This gap became my mission: to help people use foresight in practice and change the way they think about the future, and to embed its use into organisational strategy development.

On another level, the power of being part of a foresight experience – what I described earlier as the foresight switch coming on - has stayed with me since my time at Swinburne. At foresight's core lies human agency. It's people using foresight to think differently, to see new ways of working that will engender change in our strategy development and increase our future readiness. The walk in, walk out speaker/expert/facilitator will present interesting information and processes, but the ability of people to design and participate in their own foresight process will result in more compelling outcomes for their organisations as individual and collective thinking about possible futures expands beyond the status quo.

Why do I care so much about using foresight in practice? If we take a global perspective, there is much to be hopeful about in the future, but so much more that makes us pause and wonder how we can go on this way without changing some fundamental beliefs about how we live, work, and relate to each other and the planet on which we live. Our worldviews, the set of beliefs upon which we base our decisions and make sense of the world, are not fixed and are often constraining as we face the future. Our ability to believe we are totally right in the face of disconfirming evidence that challenges our worldviews is unfortunately very strong.

We can change our worldviews. We can challenge and reframe them as the world changes around us. In my work, I sometimes run an exercise called *Advice from the Future* and ask people to imagine themselves in the same place doing the same thing but in 10 or 20 years. Then, I ask them to take the

role of good ancestors and give advice to their descendants in the room today. Advice about what they should know about the future, about what they need to pay attention to today and advice about what they need to stop doing. It's always an insightful process.

Some people struggle with the flipped thinking that is asked of them, but ultimately the advice provided can be applied today to start moving beyond the status quo, to start understanding how changing how we think about the future is so important. People alternatively think it's a fun or pointless process but when we discuss it, most people in the room get the point that they were giving advice to themselves without the constraints of today at play. There are new ways to think about our challenges today.

One thing that made a difference for me was at the end of my first year in the Strategic Foresight course at Swinburne, when we were asked to reflect on what struck us most strongly during the year. I said without thinking (which is most unusual for me) "that we are responsible for future generations". I wasn't sure where that had come from but I knew then that I had accepted that responsibility. Something had shifted in my brain. Thinking about the future had rewired my brain and my worldview. And if you and I aren't responsible for future generations, who is?

The future we are creating today is ultimately for our descendants. Every decision we make as individuals and organisations has impacts that flow downstream into the future. Flipping our perspective away from seeing the future from today's perspective to being good ancestors moves us beyond thinking the future will be more of today to open up new ways of thinking about change and how we will respond in the present.

Iain Wallace, the Swinburne Vice-Chancellor who told me to 'do foresight' was a visionary and prepared to move Swinburne beyond the status quo even if people didn't like it. He recognised the value of foresight and gave me the opportunity to surface and use my own foresight capacity. Liz Harman was the VU Vice-Chancellor who gave me the space and resources to use foresight and was smart enough to recognise its value to her in her redesign of VU planning. That suited me. An open mind is all that is needed.

Once your foresight capacity is surfaced and used in practice, there is no going back to conventional thinking and conventional strategy development - and that is a good thing. I shall be forever grateful to these two Vice-Chancellors for starting me on my foresight journey.