Ideas from WBICR Retreat, Group **Exercise on Advisory Services to WBI Teams on Results-Focused CD** 

> **Categories for:** Questions related to **Diagnosis** | **Discernment**

Analysis of industry | competition | economic environment

**Definition** | bringing the initiative into focus

**Historical** analysis

Analysis of process | critical path

**Categories for:** Good practices in providing advice

Intellectual engagement Interpersonal engagement

Analysis of goals and objectives

> Stakeholder analysis

# **Questions related to Diagnosis** | **Discernment**

		D	efinition   brir	nging the i	initiative i	nto focus		
<ul> <li>Who is demanding the i</li> <li>Why?</li> <li>What is the demand for</li> <li>Is there agreement on t</li> <li>How will those who are demand is met?</li> <li>Does the potential audi</li> <li>(e.g. if e-Learning, do in</li> </ul>	initiative? r, exactly? What is the demand? doing in e demanding it judge when the • W cu rence have the needed tools? itended participants have the	WBI currently this area? Yho is WBI's urrent work med at?	<ul> <li>Who?</li> <li>What? <ul> <li>Is this initiative a stand-alone</li> <li>whole, or a part of another</li> <li>program?</li> </ul> </li> <li>When?</li> <li>Where?</li> <li>Why?</li> <li>What is the problem the proble</li></ul>		e hat is the oblem that this	Longer-term re How will we (situation b situation af What evide Near-term resu How will we (situation b situation af	sults How will tho: e know? whether / will eefore, How would y initiative? what do you will be differ e know? How do man eefore, ter)	e expected outcomes? se who have the expectatio nen the outcome has occurr ou evaluate the success of t hope to change / What do ent as a result of this initiati agers understand the result
Analysis of industry  Another way of express this initiative?competition   economic environmentWhat is the nature of supply (of content, of resources), for this initiative?What is the nature of supply (of content, of resources), for this initiative?Predictability?• Consistency?• Consistency?• Cost?• Timing?• Quality?• Dispersion? (Homogenous? Diverse?)	<ul> <li>What is the Rationale for</li> <li>What are the potential entrants to the industry / field / environment of this initiative?</li> <li>What are the barriers that have prevented them from entering so far?</li> <li>Would it be beneficial to preserve / strengthen those barriers? If so, how?</li> <li>Would it be beneficial to reduce those barriers</li> </ul>	<ul> <li>what does the hegative space" in the picture tell us?</li> <li>What is the consequence of not doing the initiative?</li> <li>What other players are in the same industry / field / environment?</li> <li>What are their roles?</li> <li>Collaborators?</li> <li>Competitors?</li> <li>What policies, treaties, rules, regulations, etc., relate to this initiative?</li> </ul>	Product • What is it? • How does ir work? • How do we know it wo "Mar Place • How convenient for the intended audience to participate / acc	to ? Pri it • re • orks? • arketing Mix" ht is it Promot ed • How inten ccess it? find of	solve? ice Amount? Timing? Who pays? Is it cost- effective? tion will the ided audience out about it?	<ul> <li>Outcomes</li> <li>How will we (situation b situation af</li> <li>What evide Outputs</li> <li>Activities</li> <li>Inputs</li> </ul>	e know? efore, ter) nce?	Who is involved in implementing the initiative? • What are their interest • Benefits to them? • Costs to them?
the needed tools?	collaboration)? If so, how?		•	ence dis <mark>se</mark>	mination			How will the agents of change make the change process happen?
	Has this initiative / approach been tested elsewhere • How did it go? • How do we know? • Evidence? • Where was it successfully applied? • How do we know / How did we judge success? • Evidence? • Case studies? Historical analysis		ere?	·?		, Wi	-	
			s?	What came before?	apply? Questions of Too soor Too late How qui How slow	rames f: ? ckly? wly?	What the steps involved in production of the initiative? What are the dependencies between steps? What are major	<ul> <li>What is the critical pa</li> <li>Where are the bottlenecks?</li> <li>Are key constraints being addressed?</li> </ul>
HT F	<ul> <li>Who is demanding the</li> <li>Why?</li> <li>What is the demand for</li> <li>Is there agreement on the</li> <li>How will those who are demand is met?</li> <li>Does the potential audition (e.g. if e-Learning, do in needed infrastructure?</li> <li>Another way of express this initiative?</li> <li>Another way of express this initiative?</li> <li>Another supply for the supply for the supply for the suppliers have the needed tools?</li> <li>Do the suppliers have the needed tools?</li> <li>Do the suppliers have</li> </ul>	<ul> <li>What is the demand for, exactly?</li> <li>What is the reagreement on the demand?</li> <li>How will those who are demanding it judge when the edemand is met?</li> <li>Does the potential audience have the needed tools?</li> <li>(e.g. if e-Learning, do intended participants have the needed infrastructure?)</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>Another way of expressing: What are the potential entrants to the industry / field / environment of this initiative?</li> <li>What are the barriers that have prevented them from entering so far?</li> <li>Would it be beneficial to preserve / strengthen those barriers? If so, how?</li> <li>Would it be beneficial to reduce those barriers (perhaps to encourage collaboration)? If so, how?</li> <li>Has this initiat</li> <li>How do Evidence</li> <li>Where was How do</li> </ul>	<ul> <li>What is the nature of demand for this initiative?</li> <li>Why?</li> <li>What is the demand for, exactly?</li> <li>What is the agreement on the demand?</li> <li>How will those who are demanding it judge when the demand is met?</li> <li>How will those who are demanding it judge when the needed infrastructure?</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>Another way of expressing: What is the Rationale for this initiative?</li> <li>What is the nature of supply content of the industry / field / environment of this initiative?</li> <li>What is the nature of supply content of the industry / field / environment of this initiative?</li> <li>What are the portential to the industry / field / environment of this initiative?</li> <li>What are the particulability?</li> <li>Consistency?</li> <li>Cost?</li> <li>Timing?</li> <li>Dube suppliers have the needed tools?</li> <li>Do the suppliers have the needed resources?</li> <li>Do the suppliers have the needed resources?</li> <li>Mat this initiative / approach been tested elsewhere the needed resources?</li> <li>What is this initiative / approach been tested elsewhere / How did it go?</li> <li>How do we know?</li> <li>Evidence?</li> <li>Case studies?</li> </ul>	What is the nature of demand for this initiative?       What is the demand for, exactly?       What is WBI currently       What is the demand for, exactly?       What is WBI currently         What is the demand for, exactly?       What is WBI currently       Going in this area?       What is the demand for, exactly?       What is the game of the second of the suppliers have the needed rolos?       What is the future tell us?       What is the future tell us?	What is the nature of demand for this initiative?       • Who is demanding the initiative?       • Who?         • Who is demanding the initiative?       • What is WBI currently doing in this area?       • Who?         • How will those who are demanding it judge when the * Who is WBI's demand is met?       • What is the eaded tools?       • What is the factored participants have the meeded tools?       • What oes the "negative structure?       • What is the factored participants have the meeded tools?       • What are the potential entrants to the industry / field / environment of this initiative?       • What are the potential entrants to the industry / field / environment of this initiative?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants to the industry / field / environment?       • What are the potential entrants (graphs to encourage collaborators?       • What are the potential entrants (graphs to encourage collaborators?       • What policies, treaties, relate to this initiative?       • How dowe in the environs?	What is the nature of demand for this initiative?       Who's demanding the initiative?       Is this initiative a stand-alone whole, or a part of another program?       Is this initiative?       Is this initiative?       Is this agreement on the demand?       Who is WB's currently whole, or a part of another program?       Who's demanding the initiative?         Does the potential addence have the needed tools?       Ge, if e-Learning, do intended participants have the needed infrastructure?       What is the Rationale for this initiative?       What is the format this initiative?         Another way of expressing:       What are the potential entrants to the industry / field / environment?       What is the consequence of not doing the initiative?       What are the potential entrants to the industry / field / environment?       What is init?       Product         • What is init?       • What are the beneficial to reduce those barriers is of r?       • What are the beneficial to reduce those barriers?       • What preserve / strengthen those barriers?       • What preserve / strengthen those barriers?       • What go ?         • Do the suppliers have the needed rosol?       • Woold it be beneficial to reduce those barriers?       • Who did it go?       • What is the consorage collaboration?       • What is the consorage collaboration?         • Do the suppliers have the needed rosol?       • Wow did	What is the nature of demand for this initiative?       Who?       Who?	What is the nature of demand for this initiative?       What is the nature of demand for this initiative?       What is the nature of demand for exactly?       What is Will currently doing in this area?       What is the demand for exactly?       What does the "negative for for exactly?       What is the demand for

## Analysis of process | critical path

utcomes? the expectation judge ome has occurred? the success of this

**Analysis of** goals and objectives

nge / What do you hope It of this initiative? tand the results chain?

#### olved in ting the

e their interests? efits to them? s to them?

#### Who is affected by implementation of the initiative?

- What are their interests?
  - Benefits to them?
  - Costs to them?

#### What is the role of each of these generic stakeholders (if not already defined)?

- WBI
- WBG {Operations?}
- Partner organizations
- Funders
- Content providers
- {Implementers?} How is
- Individual champions
   each team • Benefits to them? engaging?
- Costs to them?

## **Stakeholder** analysis

the critical path? re are the

### Intellectual engagement

## **Interpersonal engagement**

#### Follow up

#### Define problem (diagnosis), and agree with internal client on the nature of the problem, before proceeding to a solution

#### Prepare

- Know our stuff
- Review concept note if it's available • Reading with care (the materials provided / "doing one's homework"

Listen

• If unprepared, reschedule so as to respect their time {?}

#### Be explicit

- about roles
- about time frame
- explicitness can mean surfacing implicit assumptions, confirming assumptions, correcting assumptions

- {Trust can be earned by establishing a good track record}

Ask good (relevant, consistent, open-ended) questions instead of prescribing

• Offer our support,

being careful to

Say "I don't know" but don't leave it hanging

theme

#### Consider location, setting, and atmosphere for collaboration

- seating arrangement can signal
- collaboration (circle, or team members alternating around table) or conflict (head / foot of table; teams on opposite sides of table)

- Manage expectations
  - Look for opportunities to check, validate that we are
  - on the same page
- promise what we can deliver
- Deliver details

Be authentic

## Try to establish rapport and trust

- Find common ground
- Ask for a time frame for meeting
- {if lost, can be difficult to re-establish}

• tailored to the stage of the initiative in context

Provide good advice

#### Use illustrations | Draw a diagram

Be ready with resources

Frame the thinking

• Sometimes, have an agenda,

(framing the conversation)

or ask for an agenda

• Have a set of guideline

questions to use in

discussion

- Handouts on key information
- Such as handout prepared for WBI Days
- Reference relevant cases of CDRF
- Examples from other initiatives in the same sector
- Have a deep pocket of resources; present only what becomes relevant in the context of the conversation

Learn and use the language of the client / sector /