

si g h i n e ht:

a regular column
on business futures*
by *andy hines**

the facilitator v the expert, or process versus content

These days, most in-house foresight practitioners probably don't have the luxury of a large staff – in many cases we don't have any staff.

There is merit to being lean and mean, to being a broker to the outside world of experts who you can plug in as needed. Being externally focused is valued in organizations that are all too often guilty of navel-contemplation and not-invented-here. Being lean also keeps your profile low and off the budget-cutter's radar.

In this situation, the single practitioner is forced into the dual role of providing content and process regarding foresight. We have been taught that process people or facilitators ought to be neutral and above the fray. Does that mean you sacrifice all your knowledge on the altar of neutrality? It leads me to question whether these roles inherently at odds within the same person.

I have tried to blend the two roles in my work, and I believe it can be done successfully. But I've seen, heard about, and experienced pitfalls in this dual role. We, the foresight community, need to put our heads together on this. In thinking about how I fared in a recent ideation session in this dual role, it raised the larger issues of process versus content in the larger field of foresight endeavour.

My sense is that the pendulum has been swinging toward process in recent years. Consulting futurist firms seem to be emphasizing their 'tools' capabilities; their ability to help clients discover or create their own future, rather than telling firms what the future is likely to be.

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The early days of foresight seemed more aimed at experts predicting the future. This makes sense. First, the experts needed to make sense of the future, and then emphasize helping clients discover what they have discovered. Perhaps what we're seeing today is that images of the future have become so widespread that we don't need to expend as much energy on content development. It's largely been done!

Or have we simply become complacent? Or lazy? In a sense, it's more politically correct to have groups develop their own content. But this can be worrisome. Sometimes, groups don't bring much content to the table. The result: garbage in – garbage out.

So, this content-process dilemma goes beyond our personal roles inside the organization. One approach I've been trying is stacking the process deck with my content cards – literally. I've developed a card game called trend poker that gets folks to look at and prioritize a large number of trends. They can add trends of their own, but the list is comprehensive enough such that it is rarely necessary. In some cases, the suggestions have been really good ones and been added to the master trend list.

I still get calls to come in and deliver a trends or foresight lecture, and it is fun to do this once in a while, but I find myself looking to avoid this format where possible. Many times, a request for a lecture is a sign of a lazy team. When a team says they want to learn about trends, I find that a more positive signal, because it opens the door to negotiations on the best way to make this happen.

I'm trying to find other ways to deliver foresight content. I'm convinced that ownership of content by the audience is fundamental. And the key thing we must recognize today is that audiences no longer prefer to learn in the classic lecture format. Maybe twenty years ago, this was the preferred approach, but today, experiential learning is overwhelmingly preferred (at least in the USA). Audiences no longer want to be talked at – they want to be worked with.

This would be moot if there weren't the issue of there sometimes being a real need for expertise. The rub comes if you're viewed inside your organization as a facilitator or process person, your content knowledge is called into question. I recall a situation in which an internal audience member challenged my knowledge of trends, and referred to some trend reports 'that the company had spend thousands of dollars on'. I thanked him very much for the endorsement, and for the money, because I was a co-author of the very reports he was talking about, back when I was an outside consultant. I think the challenge came largely from my primary role being largely facilitative, and not being seen as a content expert. While in this case, at least, we had some pretty hard evidence that the dual role can work, not all such challenges have neat solutions. Do we lose our content credentials when we move into the inside? Anyone who's made this transition is probably chuckling. They know that you lose 50 IQ points and half your legitimacy the second you switch to insider from outsider.

So what?

First, you need to balance your process/content checkbook, both personally and organizationally. The easiest way to achieve balance is to bring in another person with complementary skills. I had the great fortune of developing a terrific de facto partnership with a colleague at Kellogg's. While I focused more on content and she on process, we often switched roles, and I think kept the distinction clear for our audiences, and kept a check on one another to maintain this clarity.

Second, a strategy for building your process skills is to 'get certified' or at least trained. It's amazing what a credential can do. I had helped write a book of scenarios, taught a course on scenarios, and used them frequently, but these credentials paled in comparison to a week long scenario training course I took from the Global Business Network. I came back with a 'diploma', and the word quickly spread that I was now certified, in effect, this course made me an expert. This was a valuable lesson. While I certainly learned a lot from the course, I feel the greatest value was in marketing the credential. So don't be proud – even when you're already an expert, don't underestimate the value of getting certified.

Finally, a strategy for maintaining or enhancing your content skills is to keep active on the outside – keep presenting at conferences and writing and networking. Still this is tough, because you can be viewed as self-promoting when you should be ‘working’. Try to bring back words from the ‘outside’, when you are at these events. Present your content in these outsider terms. Where possible, instead of using your tainted insider words, quote the outsiders. You can always find some guru who agrees with you!

This would be a great topic for you, reader, to share with us your experiences in this regard. We need more data before we can draw any firm conclusions.