The Foresight Academy Methodology

Handbook 2

gravity
What to expect

How to do what we do.

Content.

- Introduction
- Process overview
  - Scope: How to get research questions
  - Scan: How to search for signals of change
  - Hypothesize: How to create tentative predictions
- Dialogue: How to do Trend Receiver research
  - Plan
  - Question time
  - TR profile
  - Recruitment
  - The conversation
  - Interview etiquette
  - Download
- Synthesize: How to make sense of all the data
- Transfer: How to get your insight to work for you
The process guiding our methodology includes six steps, as illustrated in the diagram. We talk you through each of the six steps in this handbook. The first three take place before you hit the field. The Dialogue step for the Foresight Academy is the Trend Receiver (TR) method. Whilst linear, the Foresight Academy methodology is an iterative process. You may find yourself revisiting the Scan step consciously to better understand a trend, or offer further support for a hypothesis. Or you may be faced with signals serendipitously in daily life, and this may in turn implicate the questions you want to ask. There is a lot of logic in our methodology. It is very rigorous in terms of the depth of secondary research recommended to ground the hypotheses. A lot of thought goes into the profile of the interview candidates, and the role of scanning in the Dialogue step to optimize the insights found. The Transfer step is a critical part of this process. In fact, though it is the last step in the process, we consider how we can best transfer insights right from the outset. We view the Transfer stage as the beginning of something bigger. Something meaningful.

The Foresight Academy Methodology

- **SCOPE**: Define the boundaries of your research.
- **SCAN**: Search the margins of the known environment for signals of change.
- **HYPOTHESIZE**: Turn your key questions into tentative predictions which encompass your unvalidated assumptions.
- **DIALOGUE**: Hit the field to gather new data which your scanning has as yet not answered. E.g. Trend Receiver research.
- **SYNTHESIZE**: Sensemake the data from all inputs. Identify patterns to develop insights. These can be a springboard for future possibilities and ideation.
- **TRANSFER**: Make your new knowledge work for you by sharing it within your organization. This can include visual, story or interactive formats.

Welcome to Handbook 2.
Here you can find a comprehensive overview of the Foresight Academy methodology. We offer a step by step description of a foresight research project. Whilst we have tailored this guide to the Foresight Academy project, it can also guide you in other future trend research projects going forward.

The beginning is the end is the beginning.

For each step, we discuss what it is, and how to do it. We have included six canvases to guide you through the process, which are ideal for workshops or individual work.

Hey ho, let’s go.

Dr. Rupert Hofmann (Audi) in an intense dialogue with Remo Masala (Trend Receiver).
The “Scope” canvas helps you to consider the inputs to your final key questions. It guides you through the process of considering your strategic challenges, your project/organizational questions, and what other industries are potentially relevant for you. All of this feeds your identification of areas of interest, more specific topics, and your key research questions.

From challenges & key questions to defined areas of interest & topics
Every project starts with a well defined, feasible & measurable objective. Next, it’s time to scope your project. This means defining the boundaries of your research, i.e. “What is in, and what is out”.

Let’s get some perspective people!
Defining your perspective allows you to consciously adopt a lens when exploring your areas of interest. Are you interested in a consumer or societal perspective? Are you considering a specific macro-environmental factor (e.g. political) or a more holistic view encompassing a range of factors? Clearly articulating your lens helps you to identify topics within your areas of interest.

1. Challenges
What are the key challenges facing your organisation. This is the time to seek information that might equip you to tackle them, or turn them into opportunities.

2. Big question
Is there a big burning question(s) your organisation desires to know? This could be your project question(s) or organizational question(s). Name it, and record it.

3. Need to know
Consider what you need to know. This will be informed by your desirable known unknowns, your known knowns (knowledge base) and potential blind spots.

4. Relevant industries
Of course this depends on what industry you see yourself in! Ask in what other industries do you see potential? Identifying this is an oft missed but really important step. It stops you being too myopic and keeps you open to new opportunities.

Areas of interest.
Topics.
Research questions.
So. You have a clear perspective, you have your main challenges and what you desire answers to top of mind. Now you can identify your main themes (areas of interest). Then consider what specific topics within each theme interest you. This is driven by your perspective & the industries you are interested in. Finally, you can derive specific research questions from these topics. Give this time. This is important!
Search the margins of the known environment for signals of change

You know what themes you are interested in, and specifically what questions you need answers to. Next you should begin to scan for signals of change. Scanning is about setting the scene, painting a picture behind the themes you are examining, gathering evidence of future trends, and being open to new or unexpected trends.

1. Scan for signals

You start by doing comprehensive desk research e.g. journals, news media, blogs, business databases, foresight labs.

**Tip: Social media is a gold mine of information.** What people are choosing to post and share, and their qualitative comments can indicate important or emerging themes.

**Tip: Scan the scanners.** Be efficient! Look for well-connected sources of information that cover a range of topics you are interested in, such as Ted talks, Reddit, Futurology, PSFK, JWT. Ditch time wasting sources and keep abreast of valuable sources.

**Tip: Get out of your bubble**
Allow variety, unexpected views for serendipity. Seek out sources whose values and opinions you disagree with. You don’t want to miss signals already out there. And, you don’t want to miss signals not on your wavelength.

**Tip: Keep involved**
If you have outsourced your research, get involved in scanning. This step is too important to be left to chance. Make sure the agency you hire is scanning adequately.

2. Record signals

In order to not lose potentially powerful or interesting information you should immediately record your signals. Sensemaking begins here: in the act of identifying that the signal is relevant for your project. You can record these signals using our “Scan canvas”, or simply note it down on a post-it naming the signal and stating why it is relevant for your task. This can be accompanied by a picture to help you to visualize the signal.

**Tip: Don’t stop me now!**
Remember, signals don’t stop emerging just because you are on to the next step of your project! Keep open to signals as you progress to the Dialogue step, and let them inform your research collection and interpretation as necessary.

3. And breathe

Or at least let your data breathe. Once signals of change are identified and recorded, we advise posting them on large boards in your work space. This allows you to continue early sensemaking. You can begin to cluster fragmented, disconnected weak signals and engage in early sensemaking, for example spotting if many weak signals can indicate an emerging, surprising trend.

The “Scan” canvas is a useful tool to help you to record signals. Identifying the relevance of the signal aids early weeding of relevant data, and early sensemaking.
HYPOTHESIZE

From key questions to tentative predictions
You’ve thought hard about what key questions you want answers to. It is likely you have unvalidated assumptions about these questions. These assumptions are not based on guesses, but on the weight of signals you found during the scanning step. So turn your questions into hypotheses: tentative predictions with a clear rationale, predicting a directional relationship between the phenomena you are interested in. E.g. Millennials will reject Avocado toast!

1. Select a question
From your scoping exercise, select a question you want to turn into a hypothesis.

2. Signals & evidence
Revisit your scan records. Identify the signals that relate to this question. Remember, evidence can come in many forms: strong signals, stats, examples, anecdotes. Evidence can be clear cut or fragmented and fuzzy. How does the weight of evidence suggest this question will materialize?

3. Tentative prediction
Write the answer to your question as an informed speculation, a tentative prediction.

4. Repeat!
Revisit your scan records. Identify the signals that relate to this question. How does the weight of evidence suggest this question will materialize?

Time for some heavy lifting...
The epistemology grounding our research is “post-positivist” (Taylor & Lindlof, 2011). This advocates the use of hypothesis testing for qualitative research (Sullivan & Sargeant, 2011). This is important as this has traditionally been criticized (Bluhm et al. 2011). Post-positivism offers a good balance and common sense. It is “cautious concerning strong and one-sided interpretations, and restrained regarding the extensive (or obsessive) use of quantitative data and methods” (Adam, 2014: 5). If you want to read further on this check out the reference list at the back of our handbook. This will equip you to understand the appropriateness of hypotheses for this project, and silence the nay-sayers!

Tip: There is no right answer! The goal of your research is not to be “right”. But, to investigate whether your prediction is right or wrong. The great thing about life is we can always be surprised. The interesting questions to ask are: if my hypothesis is right, how will it actualize? How will it impact my stakeholders? Can I impact it? If it is wrong, even more interesting perhaps: why is it wrong?

Hypothesis
= 
E.g.
Millenials will reject Avocado toast!

How might the Foresight Academy hypothesize?
1. Question
How do consumers achieve happiness in 2030?

2. Evidence & signals
• Move from “having” to “being”
• 2030: the spend in services up by 3.84billion, compared to 503million increase on products (Euromonitor, 2019)
• Asian movement eschewing material things for happiness, reflecting “Zhong yong”
• Mandarin Oriental Spa & Mayo Clinic teamed up to offer a digital wellness escape
• 15% of consumers do yoga weekly to keep healthy (Euromonitor, 2019)
• “Nature” was Getty’s top search term in 2018

3. Tentative prediction
“Happiness in 2030 will be achieved through value-driven, meaningful experiences.”
**It’s field time**

By this point you have achieved a substantial amount. You know: what themes should concern you & what perspective you are taking. You know specifically what questions you are asking. You have developed informed, signal-driven hypotheses.

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**Paradox of Choice**

You now have a myriad of choices available to you. Are you opting for a qualitative or quantitative study? Or a hybrid? If qualitative, who are you going to talk to, and how are you going to talk to them? All methods have pros and cons, it is about identifying which method is going to best help you to meet your objectives. This decision is a complex one which requires thought. For now, we have thought hard about the best way to answer our hypotheses. As outlined in Handbook 1, we believe a TR study is the best choice.

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**Plan**

Before you get booking your flights and hotels (the fun bit!) you need to think carefully about the TR criteria you are interested in & the locations that are interesting for you. These two choices are driven by your topics and hypotheses. It is really useful to record the change drivers i.e. the shifts and triggers driving change in the context under investigation. This should point you in the direction of the individuals or organizations you should talk to. The “Plan” canvas guides you through this process. It also suggests what stimuli you may need to bring to your interviews to spark interesting and challenging dialogues.

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**1. Topics**

Remind yourself what topics you prioritized.

**2. Hypotheses**

What hypotheses do you want to explore?

**3. Change Drivers**

The triggers for change in the context you are interested in are useful to help you identify relevant people and organizations.

**4. Stimuli**

It is useful to now consider what stimuli you would like to bring with you during your primary research. This can help the TR transition to 2030, and offer more valuable information. Stimuli can include flash cards, reality bites, movie or podcast clips.

**5. TR criteria**

There are two things to think of here. 1. The personal capabilities which are essential for an individual to be a TR. 2. The criteria that makes the individual relevant for your specific study. We will address both points on p14.

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**6. Network**

Once you have the TR criteria in mind, you can start to brainstorm if you have an interesting connection that would fit the bill. In fact, this process begins almost unconsciously when you have clearly defined the criteria of your ideal TR.

**7. Location**

An appropriate mix of countries is often essential, particularly when we consider the growth in buying power in certain regions by 2030. Think of locations more granularly also: what cities are especially interesting for you? How are they relevant for your areas of interest?
**TRs: Competencies & capabilities**

TRs are individuals who perceive changes and potentials of future developments in highly sensitive and differentiated ways (Hofmann, 2014). They have connections in many contexts and have discerning views on what drives people and what aspects are undergoing change. To learn more about the value of TRs visit Handbook 1.

1. **Context experience**

TRs are likely to have deep knowledge in a specific area, be it aesthetics, culture, fashion, mobility, travel, health, etc. This, alongside their wide network across many industries, makes them a valuable vat of knowledge.

2. **Self-abstraction**

TRs are interested in a variety of people and perspectives, and have learnt to deal with and understand them. They can understand paradoxes without lapsing into relativism. They are self-aware and can abstract from themselves.

3. **Curiosity, heterogeneity, open-mindedness**

Driven by curiosity and the desire to understand relationships between and among signals and phenomena, TRs are very open to all signals of change. They have fine antennae for the complexities and relationships within a context.

4. **Selection competence**

Not only are TRs highly open to new signals of change, they are also skilled at filtering them. i.e. identifying the meaningful from the noise. This makes them very valuable interviewees.

5. **Biographical particularities/discontinuities**

TRs often have had professional or personal life changes. They are skilled at dealing with changes, frictions and paradoxes. They have the freedom, space and emotional stability to take risks. They may have lived abroad.

6. **Strong communication skills**

TRs are often introverted (in terms of deep thinking and elaborating on relationships between observed phenomena) and extroverted (confident and eloquent in their expression). They are typically highly convincing in their argument, and can use unexpected, but appropriate metaphors.

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**Diverse participants lead to diverse knowledge**

It can be useful to visualize potential TRs for your project with portraits on a large space. When you have gathered the visuals ask yourself: do they look different? Are they male and female? Are they older and younger? Are they from diverse career backgrounds? What about ethnicity? This may help you to narrow down your selection. Remember, they are all TRs, so all satisfy the six TR profile criteria. After that, you need to think about their value for the project, keeping diversity a priority.
Cast your net wide

To optimize the value of your field input, it is necessary to cast a wide net and seek TRs outside your local search area. Over-relying on internal expertise can bias you against alternative, unexpected insights. Consider the age old joke: A man cannot find his keys. His friend asks him why he is looking under the lamp post when he could have dropped them anywhere on the lawn. “Because there’s more light over here!” This joke illustrates an issue with recruitment: confining your search to your usual sample. We advocate pyramiding as an optimal recruiting method for TRs. It facilitates a wide distance between the context of the researcher and the context of the participants – which can introduce novel and surprising insights. It is an efficient search method for finding individuals with specific rare characteristics.

Informed consent

When you have recruited a TR, before you dialogue with them you need to get consent. You should ensure they are fully informed of how the data will be stored, used and shared. Given the nature of TR research, it is unlikely they would wish to be anonymous. The raw data is for internal use only. Insights and strategic recommendations may be more widely distributed.

Pyramiding

**WHY**

Participant recruitment is often done by a screening process, i.e. identifying desirable criteria, and filtering through potential participants until you narrow down to those who fulfill your needs. In contrast, experience with the TR methodology proves that pyramiding has significant advantages over screening – particularly when the competences you are seeking are rare and heterogeneously distributed in the population. Of course, TRs are by nature well connected, therefore making it feasible to recruit them via pyramiding.

**WHAT**

Pyramiding is a search process based on the concept that individuals with a strong interest in a given area/attribute (e.g. a particular type of expertise), will tend to know of people who know more about and/or have more of that attribute than they themselves do.

**HOW**

Individuals are asked to identify one or more others whom they think have higher levels of the attribute sought—or better information regarding who such people might be. The researcher then poses the same question to the persons so identified and continues the process until individuals with the desired high levels of the attribute (i.e. the top of the pyramid) have been identified (von Hippel et al., 2009).

Informed consent

You must get consent for:

- Recording of video/photos/audio/direct quotes
- Opt-in to be stored on your database
- Opt-in to be contacted again
- Release form for internal distribution of photos and quotes.

This is really important
Question guidelines

When designing your questions it is useful to remember: this is a guide. It is not a compulsory list of questions each interviewee must answer. They will differ in their passion and expertise in different areas, so will offer varying degrees of insight across areas. The questions are constructed so as to probe the TR’s individual wishes and aspirations for the future, as opposed to their expertise in a narrow field. They aim to tap into their tacit knowledge, and also at times inspire the TR to construct and visualize their own futures.

1. Set the scene

You need to guide the TR to transition to 2030. This may involve identifying appropriate stimuli to share with TRs once you have completed your project introduction.

2. Question blocks per area of life

As you can see in our example, we have a main question, and then some more probing questions for each topic we are interested in within each area of life. We may not need to ask the probes if TRs are very talkative.

3. Flexible focus

We may need to follow them down the rabbit hole if they take us down a surprising and interesting angle. Or, we may need to tactfully guide them back to our interests. Within each block, we have the option to introduce stimuli to trigger the TR to visualize 2030.

This excerpt from our question guide shows the balance between questions about the TR’s personal experience and their extrapolations about the bigger picture.

18
It's not (only) what you say. It's the way that you say it.

The key to the conversation is premium treatment. This sets TR interviews apart from alternative qualitative interviews. The nature of the recruitment process means TRs are a contact (perhaps through several degrees of separation) of one of the project partner’s network. The impetus is on the interviewer to possess a high level of conversational skills, deep comprehension of the themes and the specific questions. This means being involved in the scanning process, and being up to date with the many signals gathered and recorded. The conversation needs to happen on an even keel, and must follow the flow of thoughts and the direction of the conversation. The interviewer should challenge the TR, to push them to visualize potential, or unlikely futures. It may mean pushing the TR outside of their comfort zone. Sparring with them so you are both tired at the end of the interview. Typically several people will lead the conversation. The Foresight Academy methodology is designed to encourage these challenging, stimulating conversations.

Empathy plays an important role in all qualitative interviewing, this is no exception. It means having the ability and willingness to see something from another’s perspective. It can mean putting your ego aside, understanding the ‘other’, stepping outside of yourself. In a typical interview, this would mean adopting humility, leaving your judgements at the door, and abandoning preconceived ideas. In a TR interview having empathy means developing an excellent understanding of the TR’s perspective, their lived experience, their thoughts and their feelings. This does not mean we cannot challenge them or contradict them, but we first need to actively listen, and fully interpret what they say.
Interview etiquette

Be comfortable with silence. Sometimes, jewels of information emerge when someone follows their own thought process to its conclusion.

In that vein, follow their thought process. This may mean skipping questions on the guideline, asking why. Following the TR.

Pictures are important. Perhaps have two people allocated to taking photographs - those that can capture the environment, but also the interview participants.

Questions. Who can ask them and when? This needs to be decided prior to the interview. It may be that questions are kept until the end of the interview. Or indeed at the end of each section. A more casual approach is when there seems to be a natural break in the conversation, or the thought process lacks clancy for you.

Exit interviews can offer further value. Ask the TR to highlight the most relevant or preferred thoughts shared over the course of the interview. Ask is there anything else they would like to add, or if anything has change in their view of a phenomena since the start of the interview.

Interview with impact

Here we offer some guidelines to help you optimize the value of your interviews. Sometimes not filling silences is the most powerful response. How and when we ask questions is important, as is how we conduct ourselves during interviews.

Asking questions

They should be open-ended, rather than yes/no (i.e. rather than “Do you think x will play out”, try out “What do you think or how do you think x will play out”).

Avoid leading questions.

You can try out hypotheses on them and see how they respond. Remember, ask why!

Rephrase if you don’t feel you are getting to the nub of the issue.

Again, give the TR time to respond, they may get there via a longer thought process.

Lay down some ground rules

Be on time.

Know the roles in the room. Who is moderating, who is taking pictures.

Phone off. Know who is taking pictures. Equip them with appropriate equipment.

Introduce yourself. Set the scene for a friendly, open dialogue.

Avoid toilet breaks during interview.

Dress appropriately for the interview. This may mean not overly formal depending on the setting.
Instant coffee gratification
As the Foresight Academy methodology diagram reflects, the process is iterative and continuous, with room to move back and forth between steps. As soon as you’ve completed you’re interviews you can engage in further sensemaking. You can also feed nuggets of useful information back to your colleagues immediately, and instant changes can be made. Your downloads will also feed into the major synthesis step, but great takeaways can be implemented straight away. Of course if you attend multiple interviews your head may be buzzing with everything you’ve learnt, with your assumptions which may have been challenged. Our download canvas aids you in recording the most interesting quotes and the key takeaway from each interview. Adding a picture of the TR is also useful, as it can trigger thoughts you might otherwise forget.
SYNTHESIZE

It all sense makes
This is perhaps the most challenging step of the Foresight Academy methodology. Making sense of the data amassed from all inputs: the desk research, the reports, the presentations, what you’ve learned from the other brand partners. And, last, but certainly not least, the TR interviews. The early downloads got your brains working on identifying the key takeaways per interview. Now it is time to take a more holistic view. It is time to analyse all of the data gathered. A useful first step is to glean insights from the TR interviews. Our “Patterns” canvas is a useful tool to get you started.

Synthesis requires

It is useful to understand the complexity and delicate nature of synthesis. It relies on subjective judgements that call for creative sensemaking. This can often be best facilitated through workshops that offer intense interaction. It is not an easy process, and getting stuck is a common part of it. Assume it will take longer than you think it will. You may have to get comfortable with ambiguity, as it can be hard to find a “home” for some data! It is useful to visualize all of the data on large boards in your workspace, to identify patterns (commonalities and key themes). Then insight statements can be created. The insights can be clustered, these in turn can feed opportunity areas. These can be a springboard for future possibilities, ideation and strategic recommendations.

1. Themes
Did any themes recur throughout your Dialogue step? They may reflect those areas of interest identified in the scope step, or indeed they may be novel or surprising themes. A theme that recurs suggests an emerging trend.

2. Aha-moments
What surprised you, stuck with you, inspired you during the TR interviews? We hope there will be many such moments.

3. Learnings
List your 5 biggest learnings which emerged from all of the TR interviews.

4. First Answer
You noted your big question in the Scope step. Try to now formulate an answer to this. If you can answer it, you have achieved your project’s objective.

Wow. Look how far we have come. We have completed a solid, broad and deep foresight study. We have drawn on extensive scanning, on insights from TRs across three continents. We have also synthesized the data to develop valuable insights, a task not for the faint hearted! Now, we must decide how to share this information.

Visual algorithms to the future

Did you know? We are visual beings. More than 70% of our sensory receptors are in our eyes, and visual processing involves almost 50% of our brain (Merieb & Hoehn, 2007). We are also fast. It takes only 0.15 seconds for a symbol to be processed by our brain, and only 0.1 seconds for us to attribute meaning to it (Halcumb & Grainger, 2006).

From a foresight perspective visuals - whether that be professional illustrations or renderings, co-created drawing sessions, or 3D movies - can enable a group to communicate about that which does not yet exist. It can spark the conversation about how it might feel to live in a future city, or what the impact of a new product, mode of transport, or medical device might be. A visual gets people to reinterpret what they know, to mentally simulate that future, or even to challenge it. We consider visual outputs akin to visual algorithms of the future.

Narrative transportation

Have you ever enjoyed a book so much, that you forgot where you were. Perhaps you nearly missed your train stop? If so, you were transported into the world of the story, in that moment, believing in and empathising with the characters in the story world.

Narratives are a powerful tool to inform, to persuade and to imagine. A good narrative requires detail. It requires characters, a plot, a climax and a time-frame. Stories of course can be in written, verbal, visual or movie form. We already have a time-frame: 2030. Transforming our takeaways and insights into a story is another potentially powerful way to bring others into our common understanding of the futures of 2030. To take them on a journey with us.

Interactivity

There is a real appetite for interactive formats for sharing new knowledge. This could be the form of a game, or a collaborative effort in terms of creating visuals and stories. Imagine an “if-then” style game for example. If we can bring this desirable future to fruition, what does that mean for our stakeholders? Bringing colleagues, decision makers and other stakeholders into the visualization process can make the insights into viable, feasible and desirable strategic recommendations for your company.
The end is the beginning is the end.

It is the final step of our Foresight Academy methodology process, the end of the “How” booklet. But really only the start of something. It is time to make your new knowledge work for you. This may be as simple as disseminating your notes, or the “Scan” or “Download” canvases with your colleagues. Or maybe you set up a wall with key insights in your office: what you think your colleagues need to know. More complex options include organizing workshops to explain the story behind the output, or going one step further and getting your colleagues and key decision makers to co-create the story with you.

End. Embolden. Empower.

Knowledge gained from this research can embolden and empower you to stimulate impulses of changes in your life, and in your organizations. Let it be the start of something meaningful. Let it be the start of a movement.