Create: Planning for action

Background

This template is designed to help teams to plan for the next steps related to a procurement/ commercial problem. This can be run as a standalone exercise by any team looking to gain clarity on a procurement challenge. The exercise can be carried out remotely or in person but optimal value is achieved when carrying this out in person.

For the exercise to be successful, a multi-disciplinary, cross-functional team should be gathered. Stakeholders present should be of sufficient seniority (or with appropriate delegations and empowerments) to take forward any actions derived from the exercise. The session should be led by an independent facilitator, who is not involved in the project or business concern that relates to the exercise, and does not get involved in the conversation but guides the attendees through the exercises. The facilitator should possess adequate public procurement knowledge to be able to advise the stakeholder group during the exercise, if required.
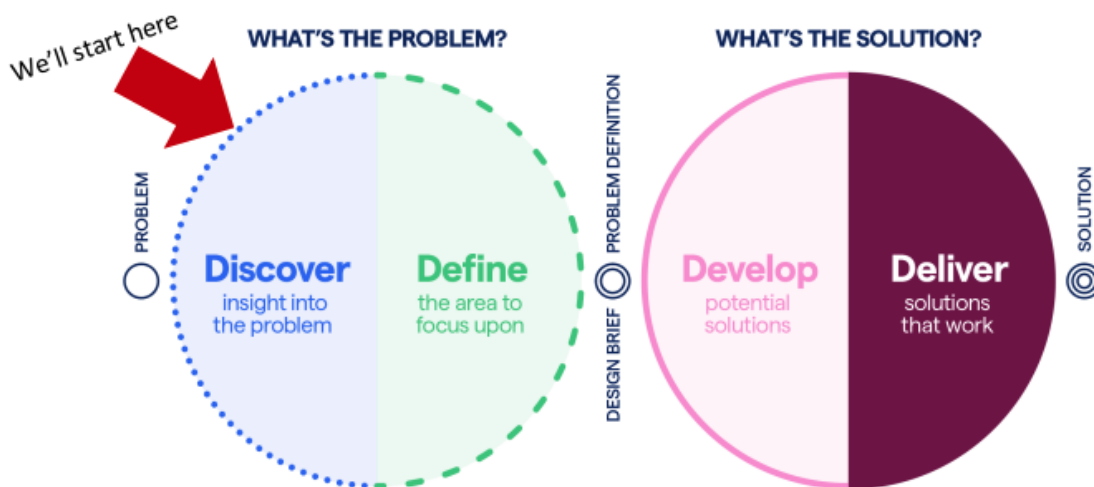

Figure 1. The four step user-centred design process based on the "Double Diamond", a universally accepted depiction of the design process. It's a simple way to describe the steps taken in any design and innovation project, irrespective of methods and tools used.

The exercises are based on foresight and futures tools and techniques, and other exercises commonly used in user-centred design (UCD). Why do we do this? Simply put, UCD and the procurement journey are very similar. The procurement journey is formed of 4 phases - Plan, Define, Procure and Manage - and the UCD process can be typically defined as being made up of 4 phases - Discover, Define, Develop and Deliver. By applying UCD principles to commercial and procurement problems, organisations can develop the procurement with the users (the public, suppliers, internal stakeholders etc) in mind.

Exercise Guide

This interactive exercise focuses on developing a portfolio of ideas for the "Plan and Define" phases of procurement, which includes a "Now, Next, Later" exercise. During the exercise, participants identify immediate actions ("Now"), medium-term steps (3-6 months - "Next"), and long-term strategies (beyond 6 months - "Later"). Examples of "Now" actions include discussing the ideas with leadership to get buy-in, while "Next" could be engaging the market and getting political buy-in. "Later" could focus on public and market consultations and further internal training.

Benefits of developing a 'Now - Next - Later' roadmap

Like many UCD tools, the [Now-Next-Later](#) roadmap was developed for product design/ management. This tool enables the team to focus on customer (or user) needs and business opportunities, rather than deadlines. As already established, the procurement process and UCD have many things in common. This is why this exercise can be effective for teams to shift their focus from a tick-box procurement exercise to focusing on business and user needs. The Now-Next-Later exercise allows teams to more effectively prioritise tasks based on delivering value quickly to business areas and/ or end users, and only commit to deadlines that are right ahead of them, rather than setting arbitrary deadlines in the distant future which can have dependencies on other actions.

The following table gives an overview of what goes into Now-Next-Later roadmap:

Now	Next	Later
Initiatives that you are working on now. As there is more certainty, these items are clearly defined and detailed. They are clear and defined initiatives and ideas that are broken down into more granular pieces of work which can be started straight away. You've got more confidence and clarity around what this work requires and what it will impact.	The "Next" is what will happen once everything in the "Now" list is complete. These are broken down less finely, with fewer specifics and details. They're not right in front of you yet, so you don't need to spend much time fully figuring them out – they might be reliant on the success or failure of an initiative or idea in the Now column. But you understand that, at this moment, they're next on the	Everything else the team proposed doing, but it won't happen until sometime in the undefined future. There is a lot of uncertainty around these items on the list. You know the general problems you want to solve but don't have details about exact solutions yet. The "Later" list keeps problems on the radar to allow teams to work towards a longer-term goal. As "Later" items move closer, they can

	list.	be explored in a more concrete and detailed way, eventually becoming "Next" and "Now" items.

Exercise: Generate ideas that help you take now, next and later steps forward in relation to your problem statement

Purpose:

- To generate ideas which will help the team take the project forward.
- To understand what are the business goals and objectives and align the steps forward to these.
- Link the steps forward to other exercises (such as Reframe the challenge and Route cause analysis).

Preparation: Individuals should come prepared for open and honest self-reflection, and to constructively challenge colleagues and be challenged by them. Furthermore, individuals should come prepared for exploration and curiosity, which encourages asking questions to understand the others' behaviours.

Participants: [List of team members or roles involved - ensure to involve a wide range of stakeholders to get proper representation.]

Materials Needed

If you are doing this in person, prepare the session by gathering the following materials:

- Whiteboard or large paper (flip charts)
- Markers in different colours
- Sticky notes

For remote sessions, you might want to use Slido, Mural, Mentimeter (word cloud generator) or other similar software permitted by your organisation's IT policies, which allows you and your stakeholders to record ideas and thoughts.

Step 1: Introduction and context setting

- **Facilitator:** Briefly explain the purpose of this exercise – to brainstorm a portfolio of ideas that move your opportunity forward. Not all the ideas you generate need to be within your scope to deliver. Emphasise that this is about exploration, not immediate problem-solving.

Step 2: Individually generate ideas

- **Prompt:** *"What can you do now, next and later to move your opportunity forward?"*
- **Activity:**
  - **Individuals generate ideas:** Each individual generates ideas for now, next and later.
  - **Group share and cluster:** Post sticky notes on the whiteboard. As a group, discuss each one, clarify, and start to cluster similar ideas. Label the clusters.

Step 3: Build and Agree

- **Prompt:** *"Build on each other's ideas. No critique at this stage. Yes, and... rather than No, but… Agree the simplest next steps for any of the ideas you agree you have the influence to make happen."*
- **Activity:**
  - **Group discussion:** As a whole group discuss the steps individuals have put forward and build on these.
  - Make decisions on which steps the group can take and which may need buy-in from stakeholders/ users not present in the room.

Step 5: Wrap-up and next steps

- **Summary:** Briefly recap the steps which will move your opportunity forward.
- **Transition:** Explain how this understanding will inform future discussions (e.g., "This informs who we need to involve to move this forward", etc).
- **Future action:** What is the very next step for this team based on this exercise? (e.g., "Share findings with [X team]", etc).