Tool: Prototyping

Overview

Prototyping moves an idea or innovation into something concrete. A prototype is an experiential microcosm of the future you want to create; it allows you to "explore the future by doing." A prototype is an early draft of what a final project or initiative might look like; it can go through several iterations, based on feedback from stakeholders. The purpose of Prototyping is to refine an idea and its underlying assumptions, and to test what later could become a pilot project that can be shared and eventually scaled up.

Application

After a group completes the sensing and presencing stages that make up the left and bottom sides of the U-process, the next stages allow a group to crystallize ideas and prototype them. Prototyping is a mini U-process in itself, and follows the three stages of co-sensing, co-inspiring, and co-creating, moving a group or individuals up the right side of the U-process.

Principles

- **Set intention.** Intention is powerful. Connect to the future that stays in need of you. Crystallize your vision and intent. First and foremost, when Prototyping, you need to stay connected to the idea, the inspirational spark of the future that got you started.
- **Form a core team.** Your prototype might require you to work with a team. If so, it is important for this team to reflect the diversity of players and stakeholders in the system. The team should be committed to making the prototype projects its number one priority for a specified period.
- **Arrange infrastructure.** Prototyping requires a supporting infrastructure, including:
    - a place (a cocoon) that helps an individual or group to focus on creative work with minimal distractions.
    - a timeline with strict milestones that produces preliminary prototypes early on and generates fast-cycle feedback from all key stakeholders.
    - content help and expertise at important junctures; process help that enables the team to go through rapid experimentation and adaptation every day (after-action reviews), and to benefit from peer coaching on the key challenges of the way forward.
- **Integrate head, heart, and hand.** Moving down the left-hand side of the U is about opening up and dealing with the resistance of thought, emotion, and will; moving up the right-hand side is about intentionally reintegrating the intelligence of the head, the heart, and the hand in the context of practical applications.
- **Iterate, iterate, iterate.** Create, adapt, and always be in dialogue with the universe, the context. A prototype must be grounded in the purpose it is Intended to serve. Every Prototyping process requires continuous feedback from reality.

Resources

- Scharmer, Otto. 2007. *Theory U*, Second Edition, Chapter 21. Oakland, CA: Berrett-Koehler.
- Coughlan, Peter, Jane Fulton Suri, and Katherine Canales. 2007. "Prototypes as (Design) Tools for Behavioral and Organizational Change: A Design-Based Approach to Help Organizations Change Work Behaviors." *Journal of Applied Behavioral Science* 43(1): 1–13.

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Process

Setup

Prototyping is a process that is specific to the idea or concept it intends to support. Some prototypes are concrete products; others are personal and relate to leadership challenges; others are organizational, such as meeting structures, procedures, services, or experiments. Whatever the prototype outcome, participants will develop it using an underlying process.

- **People:** ~5 people who represent a microcosm of the challenge that is being addressed.
- **Place:** Contextual to the prototype and supportive of the activities you will perform.
- **Time:** Timing will differ with the context and type of project. Prototyping can take a few days, weeks, or months, or even years.
- **Materials:** The materials you use will depend on the project. Options include journals or paper, pens, Post-It notes, chart paper (on a wall or easel), and markers.

Prototypes can differ in scale and scope. The following steps describe the milestones in the process, but each process needs to be adapted to the specific situation.

Steps

Step 1: Clarify Intention

The intention of a prototype is its driving force! Prototyping begins when the intention has been clarified. This happens at the bottom of the U-process.

Step 2: Sense the System and Stakeholder Perspectives

Explore the perspective of the users, stakeholders, and other persons who will be served by the prototype. Step into their shoes. This is best done physically; for example, imagine that you are the customer. The longer and more concrete this exploration, the better. You might want to use the Stakeholder Interview or Learning Journey tools to develop these perspectives.

Step 3: Find Stillness

Create a moment of stillness for yourself and for the team. Consider using practices of mindfulness, or simply sit in silence.

Step 4: Brainstorm

After stillness, begin to brainstorm ideas. There are no limits on time or the number of ideas that can be generated! Again, the details of the brainstorming phase are determined by the project or idea. Collect the ideas on cards or Post-It notes and arrange them on a board in front of you.

Step 5: Develop the Idea

Now step from the brainstorming phase into a decision-making mode. A good prototype is a microcosm of a world you are trying to create and is refined with awareness of the whole ecosystem. As you develop your Prototyping idea, consider:

1. **People:** Is the idea or project relevant to key stakeholders? Who needs to be included? Does the prototype leverage the strength of existing networks and communities?
2. **Timing:** Can you test your Prototyping idea quickly? You must be able to develop experiments right away, in order to have enough time to get feedback and adapt. How will you run your prototype over the next few weeks? What is feasible, practical, and useful for you to do?

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3. **Scale:** Can you develop a small prototype at first and then scale it up? Can you experiment with your idea locally, and let the local context teach you how to get it right?
4. **Intervention:** Considering the ecosystem of your Prototyping idea:
    a. How does it address the root causes of the challenge, rather than just the symptoms?
    b. How does it deepen awareness of, and within, the ecosystem?
    c. How will it shift relationships in that system?
5. **Feedback:** How will you pay attention to messages from the "universe" along the way?
6. **Learning:** How will you harvest the learning and iterate your idea?

Step 6: Form a Core Team, a Microcosm of the New

After you have selected key ideas for Prototyping initiatives, form a core team for each one. Often at this stage you need to bring in new people to complement the existing competencies and players. In cross-sector work you need a process for "onboarding" the right people. This can take some time. At this stage you may decide to take another Learning Journey to the places and partners with the most potential to help with your Prototyping initiative. This is an iterative process. If you are working on a personal prototype, the team you bring onboard could act as a coach or mentor.

Step 7: Share and Reflect

Each time you reconnect as a core team, share everything that has been learned. After you have finished sharing, when you have time, move into a period of stillness and deep reflection. Allow the inner knowing to emerge. Options: Take a solo walk, do individual journaling, move into a moment of stillness. Then share with the team what emerges and speaks to you from that stillness.

Step 8: Crystallize

Jointly crystallize the results of the co-sensing and co-inspiring phases and then reframe your Prototyping idea.

Step 9: Evolve

Evolve your prototype by creating a small living example quickly (particularly by connecting and relating to people in the community and in the field who are already doing similar work) and then learn from the feedback you receive. Always be in dialogue with the universe and continue to iterate, iterate, iterate.

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