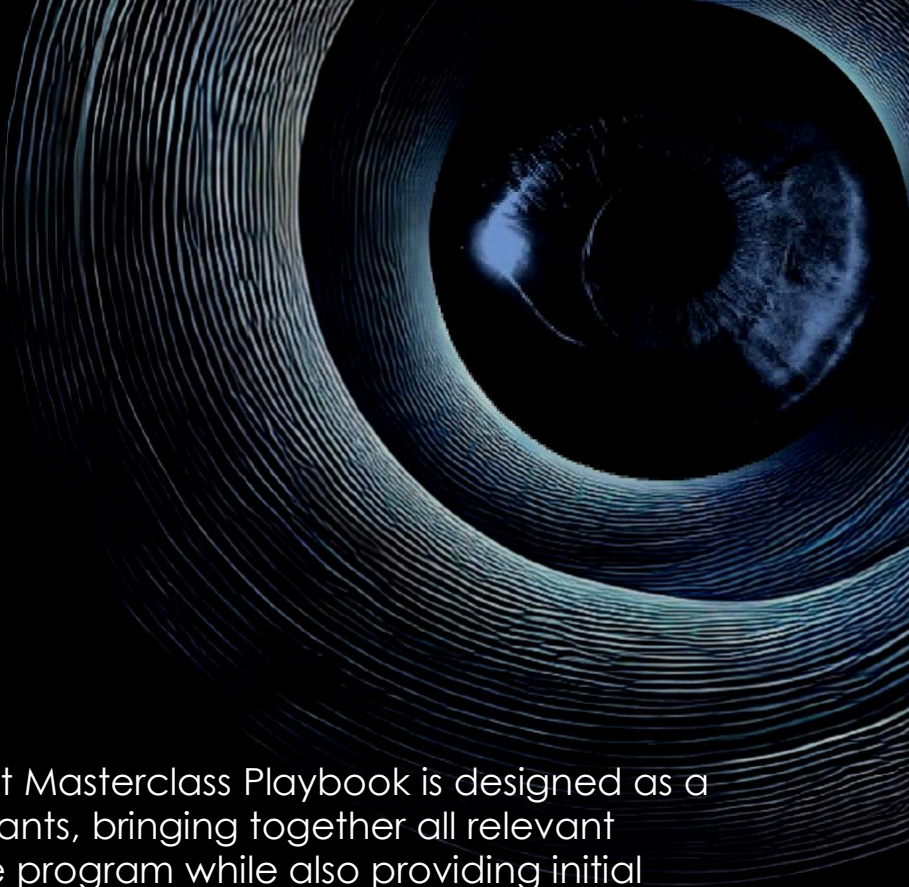


# Strategic Foresight Masterclass Playbook

February 2025



This Strategic Foresight Masterclass Playbook is designed as a reference for participants, bringing together all relevant information about the program while also providing initial guidelines into the core content and tools used throughout the series.

# 1. Welcome & Introduction

## About the Strategic Foresight Masterclass Series

Mastering Strategic Foresight is a fully online, five-session Masterclass series created for strategists, innovators, business leaders, policymakers, and anyone seeking to anticipate and shape the future in uncertain times. Each session dives into critical aspects of Strategic Foresight and Scenario Planning, providing you with immediately applicable tools to thrive in an era marked by volatility, uncertainty, complexity, and ambiguity (VUCA).

The primary goal is to offer conceptual clarity and practical toolkits that empower participants to:

- Develop forward-thinking mindsets and capabilities
- Anticipate emerging challenges and opportunities
- Devise robust strategies and transformative policies
- Integrate future-oriented thinking into strategic decision-making

## Program Highlights

### 1. Real-Time Sessions

- Live sessions on Zoom, each featuring opportunities for Q&A.
- Four sessions of 1 hour (12:00–13:00 London time); One final “Scenario Planning Lab” of 2 hours (12:00–14:00 London time)

### 2. Exclusive Resources

- Curated reading lists, websites, and podcasts to deepen your understanding of Futures Studies and Foresight.

### 3. Access to ORION.AI

- Complimentary one-month access to ORION.AI Pro, a Generative AI platform supporting the scanning and analysis of signals, trends, and driving forces.
- This tool accelerates building future-oriented strategies and transformation roadmaps by automatically categorizing insights, signals, and trends.

### 4. Flexible & Comprehensive

- Option to attend individual Masterclasses for targeted insights or enroll in all five to gain an in-depth command of Strategic Foresight and Scenario Planning.

### 5. Immediate Applicability

- Practical, time-tested frameworks—Scenario Planning, Foresight Tools, and Generative AI support—that can be integrated directly into ongoing projects, strategic roadmaps, and innovation initiatives.



## 2. Coordinator & Lead Professor

Paulo Soeiro de Carvalho



Paulo Soeiro de Carvalho is an expert in Foresight, Strategy and Innovation, with more than 20 years of experience in public and private organizations, working in several consulting projects, and also developing teaching, training and research activities in those fields.

Paulo founded in 2019 "IF Insight & Foresight", a consulting studio that combines Foresight, Strategy and Innovation to create added value and distinctive experiences for organizations and professionals. Expert and consultant for the World Economic Forum, European Commission, Joint Research Center and European Environmental Agency in the areas of Strategic Foresight and Innovation.

Over the last 15 years has been carrying out multiple research and academic activities, including the Coordination of Master, Post Graduation and Executive Programs at Lisbon University. From 2020 to 2023 he was the Executive Director of the Lisbon University Executive MBA.

Paulo has a PhD in Management Sciences from the Université Jean Moulin Lyon 3.

Paulo brings extensive hands-on experience in designing, implementing, and teaching future-oriented strategic projects, making him an ideal guide through this immersive Masterclass series.

## 3. Program Structure & Logistics

### Format

- Online & Live via Zoom
- Session Schedule:
  - Masterclass #1–4: 1 hour each (12:00–13:00 London time)
  - Masterclass #5 (Scenario Planning Lab): 2 hours (12:00–14:00 London time)
- Start Date: 26 February 2025
- Frequency: One session per week
- Target Audience: Anyone interested in Futures and Strategic Foresight, regardless of prior experience.

### Program at a Glance

1. Masterclass 1: Strategic Foresight—The Foundations
2. Masterclass 2: Strategic Foresight—Key Concepts & Frameworks
3. Masterclass 3: Strategic Foresight—Mapping Methods & Tools
4. Masterclass 4: Scenario Planning—Building Multiple Futures
5. Masterclass 5: Scenario Planning Lab—From Anticipation to Action

### What You Will Receive

- Live Instruction and Interaction: engage directly with the instructor and peers, ask questions, and receive immediate feedback.
- Supportive Community: network with a global cohort of fellow professionals interested in Strategic Foresight.
- Exclusive Resources: reading lists, toolkits, and curated references to support deeper exploration.
- ORION.AI Access: one-month free subscription to accelerate scanning and analysis of emerging signals.

## 4. Detailed Curriculum

Below is an in-depth look at each Masterclass covering fundamental and advanced Foresight and Scenario Planning approaches.

### Masterclass 1: Strategic Foresight—The Foundations

#### Purpose & Learning Objectives

- Discover the interdisciplinary nature of Strategic Foresight.
- Main assumptions to foster a forward-looking perspective.
- Develop the mindset and critical skills required to excel in futures work.
- Explore the importance of combining Foresight with Strategy, Innovation, and Entrepreneurship.

#### Key Concepts and Topics

1. Foresight: Between Science, Art, and Practice
  - Understanding Foresight vs. Forecasting models.
  - The importance of creativity and intuition alongside data-driven insights.
2. Assumptions and Principles of Foresight
  - The future is open, multiple, and shaped by human decisions.
  - Why “better futures” derive from holistic and proactive thinking.
3. Defining Strategic Foresight
  - How Foresight differs from purely predictive methods.
  - The concept of an “organizational radar” that scans beyond the usual operational lens.
4. Skills & Mindset of a Futurist
  - Systems thinking, anticipatory thinking, curiosity, holistic approaches.
  - Emphasis on ethical orientation, imagination, and resilience.
5. Foresight Needs Strategy, Innovation & Entrepreneurial Mindset
  - Linking long-term thinking (Foresight) with short-term execution and new venture creation.
6. The New Era of Foresight
  - Generative AI, Speculative Design and Design Fiction as emerging tools to explore alternative futures.

### Masterclass 2: Strategic Foresight—Concepts & Frameworks

#### Purpose & Learning Objectives

- Identify core Foresight concepts like megatrends, trends, weak signals, wildcards, and uncertainties.
- Examine the interplay between these concepts and how they shape strategic insight.
- Evaluate which Strategic Foresight framework(s) best fit your organizational context.

#### Key Concepts and Topics

1. Strategic Focus & Time Horizon
  - How to define your focal question or strategic focus.
  - Determining the ideal time horizon.
2. Megatrends
  - Long-term global driving forces that significantly impact societies and industries.
  - Examples: demographic shifts, digitalization, climate change, resource scarcity.
3. Trends and Signals
  - Distinction between established trends and emerging weak signals.

- Techniques for systematically monitoring these shifts, such as continuous scanning and intelligence platforms.
- 4. Wildcards & Black Swans
  - Low-probability, high-impact events.
  - How to integrate them into strategic discussions and scenario building.
- 5. Risks & Critical Uncertainties
  - Identifying the uncertainties most relevant to your strategic focus.
  - Techniques for prioritizing these based on impact and unpredictability.
- 6. Overview of Strategic Foresight Frameworks
  - Scanning, Sensing & Acting framework: a mindset and method to foster agility and continuous learning.

## Masterclass 3: Strategic Foresight—Mapping Methods & Tools

### Purpose & Learning Objectives

- Master a toolbox of Foresight methods for scanning and mapping the future.
- Develop practical skills to visualize and interpret cascading impacts.
- Learn to align different methods with your organization’s unique strategic priorities.

### Key Concepts and Topics

1. Creative Techniques & Ideation
  - Brainstorming, Brainwriting, and other ideation techniques to explore possible futures.
  - How to harness “out-of-the-box” thinking to spot discontinuities and new opportunities.
2. Environmental & Horizon Scanning
  - Systematically tracking external signals and developments.
  - Identifying the “weak signals” that may eventually disrupt current trajectories.
3. Futures Wheel
  - A mapping technique for visualizing the ripple effects of trends or events.
  - Helpful in evaluating second- and third-order impacts.
4. Stakeholder Analysis
  - Mapping influence, interests, and power structures.
  - Identifying potential champions, blockers, and key collaborators for future-focused initiatives.
5. Causal Layered Analysis
  - Digging beneath the surface of trends, examining underlying narratives, cultural beliefs, and systemic structures.
  - Encourages deeper reflection on the roots of change.
6. Scenario Planning
  - The basics of building multiple, plausible future scenarios.
  - Preparation for a deeper dive into scenario methodologies in Masterclass 4.
7. Three Horizons Framework
  - Structuring innovation and transformation strategies across short-, mid-, and long-term perspectives.
8. Strategic Radars & Roadmaps
  - Building continuous intelligence systems to align daily decisions with long-range objectives.
  - Linking scanning insights to real-time strategic actions.



# Masterclass 4: Scenario Planning — Building Multiple Futures

## Purpose & Learning Objectives

- Refine your understanding of scenario methodologies and processes.
- Learn how to select critical uncertainties and transform them into scenario ‘axes’ or ‘structures.’
- Incorporate scenario insights into your larger strategic vision and roadmap.

## Key Concepts and Topics

1. What are Scenarios?
  - Structured but creative narratives describing alternative futures.
  - Emphasis on diverging yet plausible environments.
2. Why, When, and How to Use Scenarios
  - Timing and context for scenario projects (e.g., major disruption, new market entry, policy reform).
  - Common pitfalls and best practices.
3. Building Scenarios from Critical Uncertainties
  - Identifying crucial forces with high impact and high uncertainty.
  - Scenario matrix approaches and morphological analysis.
4. Scenarios as Stories
  - Techniques for crafting compelling narratives that make data and logic memorable.
  - Incorporating storytelling elements to engage stakeholders.
5. Linking Strategy, Strategic Vision, and Scenarios
  - Translating scenario insights into actionable strategic plans.
  - Using scenario narratives to test current strategies, spot gaps, and reveal new opportunities.
6. Scenarios in Action: Use Cases
  - Real-world examples (e.g., Shell, LEGO, Government agencies) demonstrating scenario successes and lessons learned.
  - How scenario planning drives innovation and resilience.

# Masterclass 5: Scenario Planning Lab—From Anticipation to Action

## Purpose & Learning Objectives

- Apply the “Scanning, Sensing & Acting” framework in a guided, hands-on scenario project.
- Learn to transition from future anticipation (scenario creation) to strategic action (option exploration, policy redesign, innovation initiatives).
- Leverage ORION.AI for scanning data, categorizing signals, and building scenario structures.

## Lab Structure

1. Defining the Strategic Focus & Time Horizon
  - Clarify the focal question guiding the scenario exercise.
  - Choose an appropriate horizon for your strategic inquiry (e.g., 2030, 2040).
2. Conducting Thorough Scanning
  - Build a “Scanning Dashboard” capturing Megatrends, Trends, Weak Signals, and Wildcards.
  - Use ORION.AI to assist in data gathering and categorization.
3. Selecting Critical Uncertainties & Building Scenarios
  - Narrow down the driving forces with the greatest potential impact and unpredictability.
  - Develop initial scenario “structures” or “axes,” then flesh out distinct storylines.
4. Transitioning from Anticipation to Action
  - Explore strategic options and co-create a future vision.
  - Redesign policies or jump-start innovation projects based on scenario insights.
  - Develop “stress tests” for each scenario to assess your current or potential strategies.
5. Presentations & Feedback



- Small-group or individual presentations of scenario findings.
- Feedback and discussion on how to implement scenario thinking post-lab.

# 5. Practical Information & Next Steps

## 6.1 Before the Program Begins

### Calendar & Session Links

- You will receive a link to the Zoom room for each Masterclass. Keep an eye on your inbox for reminders.

Reading & Resource Pack

## 6.2 During the Program

- Attend Live: Engage in real-time Q&A, polls, and interactive exercises.
- Take Notes & Ask Questions: We encourage you to share your thoughts or specific case examples.
- Participate Actively: The more you contribute to discussions, the richer the collective learning experience.
- You will receive a curated collection of articles, websites, and podcasts.
- ORION.AI Access: you will receive instructions for setting up your free one-month access. We encourage you to install or sign up prior to Masterclass 5, so you can test the tool in time for the lab.

## 6.3 After the Program

- Apply What You Learned: Begin using scenario planning or scanning methods in your strategic workflows.
- Stay in Touch: You will remain part of the alumni network, where you can share updates, articles, and insights on futures thinking.
- Leverage ORION.AI: Use the platform to maintain your scanning and categorization activities. Consider extending your subscription if it proves valuable to your team.

# 7. Additional References & Bibliography

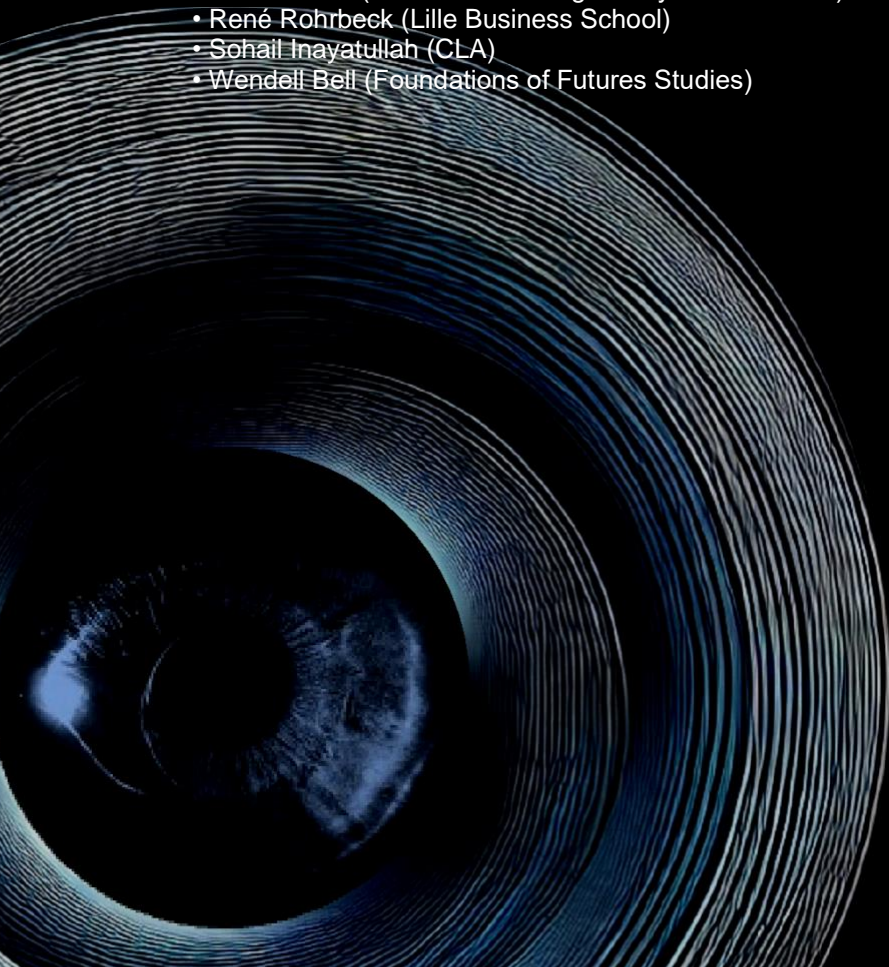
Below are a few key resources that will be referenced during the Masterclasses. Further reading lists will be provided.

## 1. Foresight Institutions & Foresight in Organisations

- Association of Professional Futurists
- Copenhagen Institute for Futures Studies (CIFS)
- Dubai Future Foundation
- European Commission (Foresight Report & Megatrends Hub)
- IFTF (Institute for the Future)
- Millennium Project
- Shell Scenarios (Corporate Foresight pioneer)
- SITRA Finland
- Teach the Future
- World Economic Forum – Strategic Intelligence
- World Futures Studies Federation

## 4. Researchers and Authors

- Amy Webb (Emerging Tech, and Exponential Trends)
- Andy Hines (Houston University)
- Jerome Glenn (Millennium Project)
- Michel Godet (La Prospective, CNAM Paris)
- Peter Bishop (Teach the Future)
- Peter Schwartz (Shell, GBN, Salesforce)
- Pierre Wack (Scenario Planning at Royal Dutch Shell)
- René Rohrbeck (Lille Business School)
- Sohail Inayatullah (CLA)
- Wendell Bell (Foundations of Futures Studies)





## 8. Your Foresight Journey Ahead

We're excited to have you join the Strategic Foresight Masterclass Series. By the end of this journey, you will not only have deepened your understanding of Foresight principles and scenario-building techniques but also integrated these practices into your strategic planning, innovation projects, and policy work.

Remember: Foresight is not about predicting the future. It is about broadening your awareness, challenging assumptions, and acting on strategic insights to shape more resilient, inclusive, and sustainable futures.

We look forward to embarking on this learning adventure together!

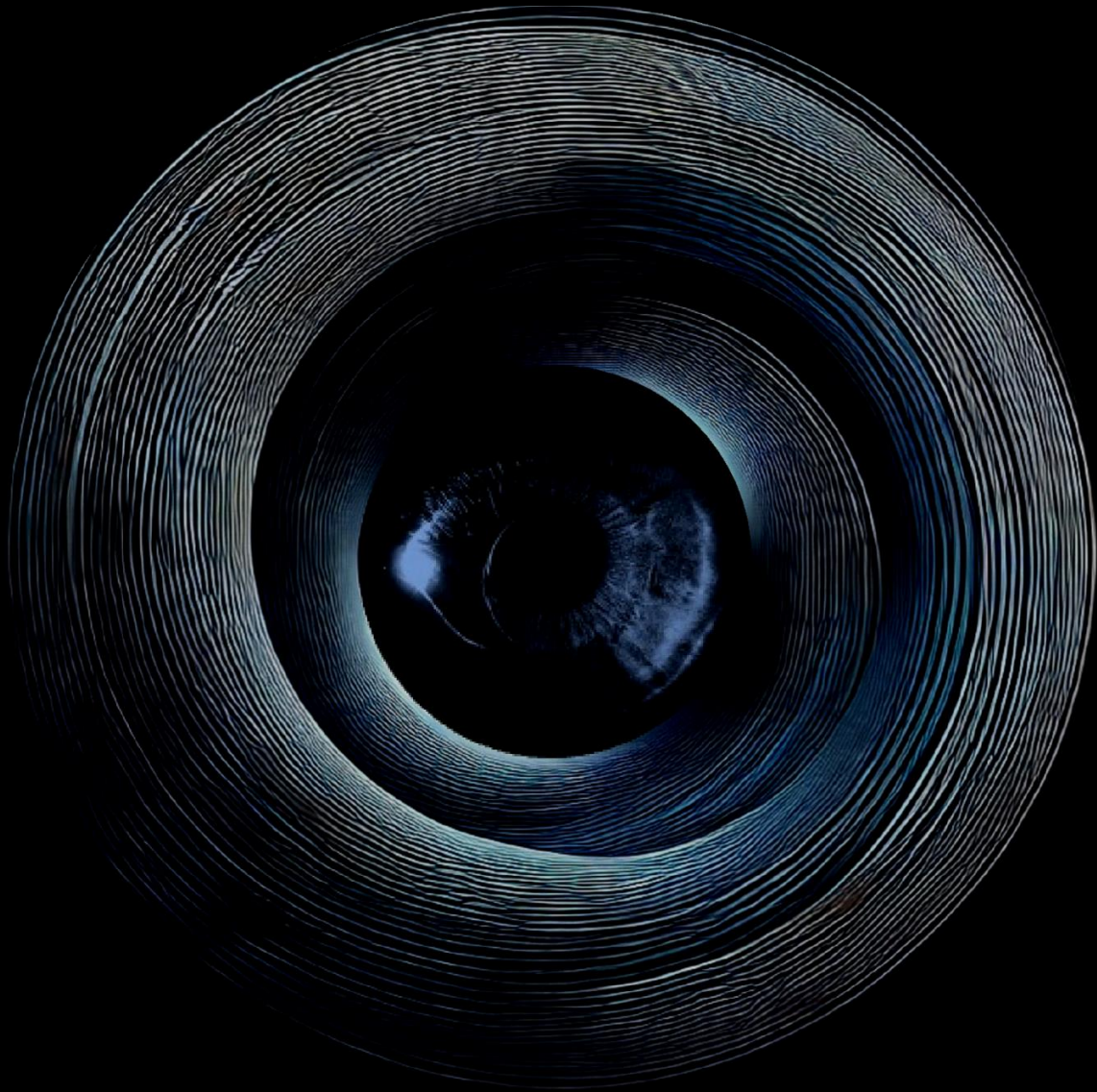
### **For Questions or Additional Support:**

- Program Coordinator: Paulo Soeiro Carvalho
- Technical Support: [info@ifforesight.com](mailto:info@ifforesight.com)
- Website: [www.ifforesight.com](http://www.ifforesight.com)

## About IF Insight& Foresight

IF Insight & Foresight is a leading consulting studio that blends foresight, strategy, and innovation to create lasting value and meaningful experiences for people and organizations.

Our global positioning and leading role are confirmed through partnerships and collaborations with organizations such as the World Economic Forum, Dubai Future Foundation, European Commission, and the European Environmental Agency, as well as a portfolio of clients that includes companies such as Randstad, Swiss Life, Zurich, Galp, among others.



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