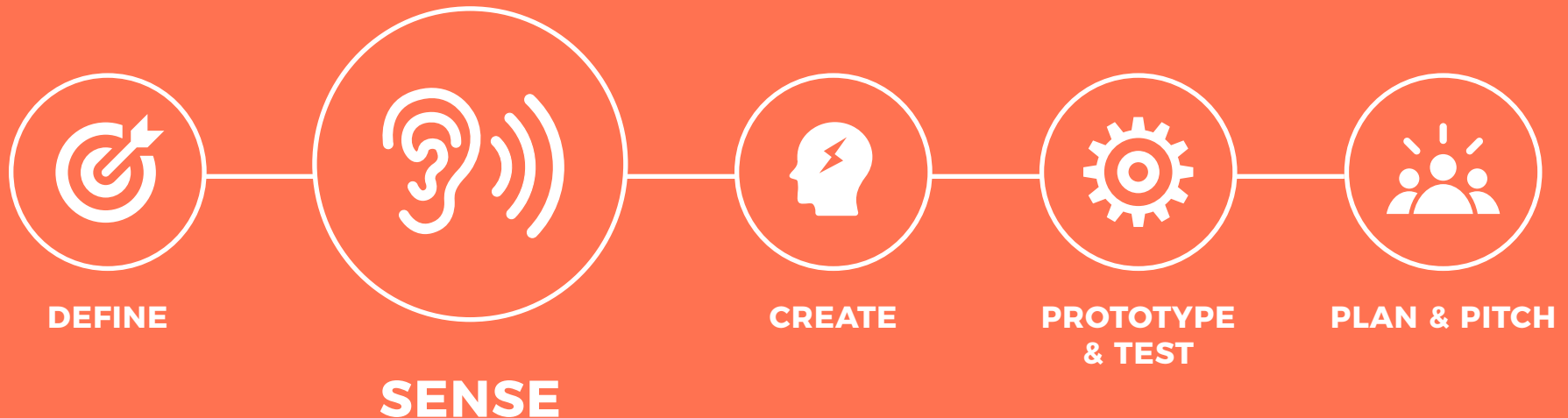


# SENSE



The Campaign Accelerator blends high-performing campaign strategy tools with proven methods inspired by design thinking. This is a practical guide for planning campaign projects that put people at the centre of our efforts for change through a collaborative process that involves the entire project team using visual templates, methods and exercises.



# Table of Contents

<b>About Campaign Accelerator</b> .....	<b>7</b>
<b>Introduction</b> .....	<b>8</b>
<b>Module 2: Sense</b> .....	<b>79</b>
What is Sensing? .....	83
<b>SECTION 1: Sensing Prep</b> .....	<b>84</b>
EXERCISE 1: Persona .....	85
EXERCISE 2: Framing .....	88
EXERCISE 3: Persona Role Play .....	91
EXERCISE 4: Questioning Guide .....	93
What makes a good question? .....	96
<b>SECTION 2: Sensing Methods</b> .....	<b>97</b>
SENSE METHOD 1: Pop-up Research .....	98
SENSE METHOD 2: Interviews .....	100
SENSE METHOD 3: Immersion .....	103
SENSE METHOD 4: Talking to Extremes .....	105
SENSE METHOD 5: Self-documentation .....	107
SENSE METHOD 6: Conversation Starters .....	109

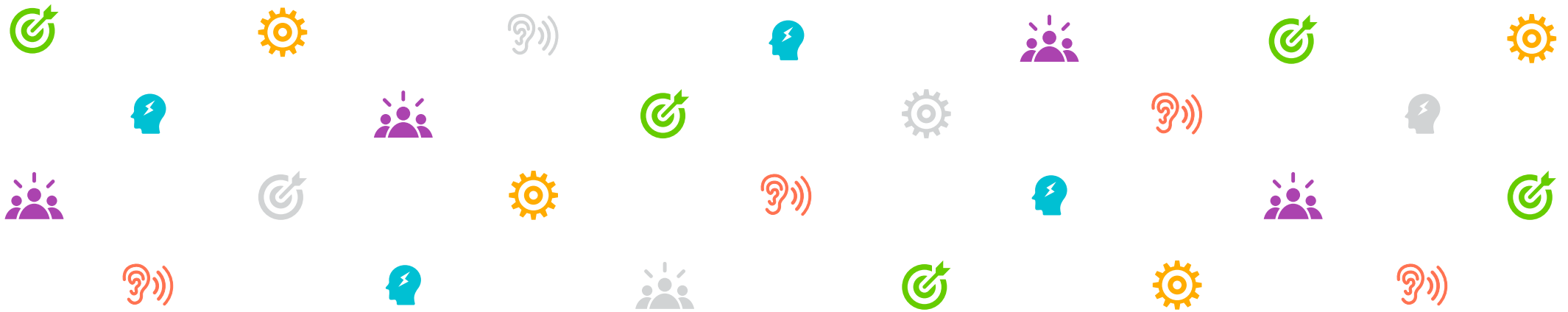
These tools are presented in the order we use them to gain insight into our audiences, however...you may not need all of these tools for your project. Start by evaluating the tools and determine which ones make sense for your specific project. Then map out the path and methods you will use.



Throughout the guide you will also find some tips from experienced users of these tools. Send us your tips to add to the guide.



<b>SECTION 3: Making Sense</b>	<b>111</b>
What is an Insight?	112
EXERCISE 1: Audience Stories	113
EXERCISE 2: 5 Loudest Statements	115
EXERCISE 3: Finding Patterns & Themes	117
EXERCISE 4: Insight Statements	119
What are Focus Questions?	122
EXERCISE 5: Focus Questions	123
EXERCISE 6: Campaign Canvas	127
<b>Download Templates &amp; Exercise Tools for Module 2: Sense</b>	<b>130</b>



# About Campaign Accelerator



## **This is a participatory process.**

By bringing together project teams with diverse skills and perspectives to develop strategy and tactics through participatory exercises, integration is baked in and brings greater team alignment.



## **People are at the centre of our planning.**

Throughout the process we involve people outside the project team — allies, supporters and people we wish to engage — to gain insight, inspiration and test ideas to make them fit for purpose.



## **These are practical tools.**

They are a blend of campaign strategy tools, including system thinking, and human centred design that can be combined in different ways to create a process that works for your team.



## **This is a work in progress.**

Everything in this toolkit is a prototype. We are constantly testing, evaluating and learning how to improve this process and we invite you to provide feedback on the methods and tools to improve it based on your experience.



## **This approach is flexible and adaptable.**

This process isn't intended to be linear. You may need to iterate several times to get to your solution. We encourage you to adapt, hack and improvise to improve on what you see here.

---

# Introduction

People powered campaigns thrive on strategies that put people at the centre of change. It's a shift for many campaigns and campaigners, so we created the Campaign Accelerator to blend a systems approach to strategy with proven methods inspired by design thinking. We've found that this hybrid approach enables teams to build campaigns that engage more people in deeper, more powerful ways, quicker. By accelerating the planning process we can get campaigns out the door faster, and learn and adapt from our campaigning to create more effective people powered campaigns.

**This is an action-based process.** We develop ideas and test theories. We get out of the meeting room and work with key audiences. Over five days, the plan evolves and gets refined. By the end of the five day programme, teams generate a project plan with clear next steps based on an analysis of the problem and solution, audience feedback, and tested ideas that address the campaign challenge. Teams also walk away with processes and tools for radical collaboration and planning that can be taken forward and used long after the Accelerator ends.

We have presented the Accelerator here as an intensive 5 day process, but **how you use these tools is up to you.** You can break it down and develop your plan over a longer period or select a few tools and methods to create a campaign in a day to respond to current events. In reality you'll find the process is not linear; you may revisit these tools and techniques many times as you learn and develop the campaign based on feedback.

### Are you ready for a people powered approach?

The Campaign Accelerator puts people power at the centre of the strategy and campaign planning process. No matter how many skilled staff and volunteers we claim, it will take more than our individual organisations to create and sustain the change the world demands of us. People powered movements are transforming the world — and our work.

By building strong and effective people powered strategies into our campaigns and projects, we can enable countless individuals to take an active role in change-making. The result: more campaigns, more wins, bigger victories and sustained movements that can scale to take on the enormous challenges our planet and humanity faces.

While there may be other strands of work your organisation or team takes on to deliver change, in this process we focus in on who can help us create change and connect with them through this process to inspire campaign stories, activities and engagement.

Before embarking on this process, your team and key decision makers need to be committed to a people-powered approach to campaigning.

To learn more about people power, download the [Mobilisation Cookbook](#).

### Are you ready for a participatory approach?

Collaboration is one of the core values of this approach. Team members contribute equally throughout the process by relying on diverse perspectives and expertise. Together, problems are identified and solutions tested, building a culture of collaboration that lasts beyond the planning process.

Team members have remarked that there was no difference between roles during the process. By bringing together project teams with diverse skills and perspectives to develop strategy and tactics through participatory exercises, integration is baked in and brings greater team alignment.

Alignment on strategy and plans through the process brings higher levels of autonomy during implementation. While the team will agree the strategy, creative direction and big elements together, other details of the plan can be developed by those with specific expertise. This means the team is able to focus on the big picture together instead of small details.

This can create a level of internal disruption which surfaces current power dynamics and provides an opportunity to transform them. Those people who have traditionally held power over decisions need to be open to everyone's perspectives and input during the process and willing to share power and decision making with all team members in order for this collaborative approach to be successful.

## Why do we take a systems approach?

Often the problems we are trying to solve are deeply complex and are part of larger integrated systems. When we try to create change and “fix” just a part of that system, the system often adapts and the problem reappears somewhere else. In order to create lasting change that addresses the root of the problem the whole system needs to be transformed.

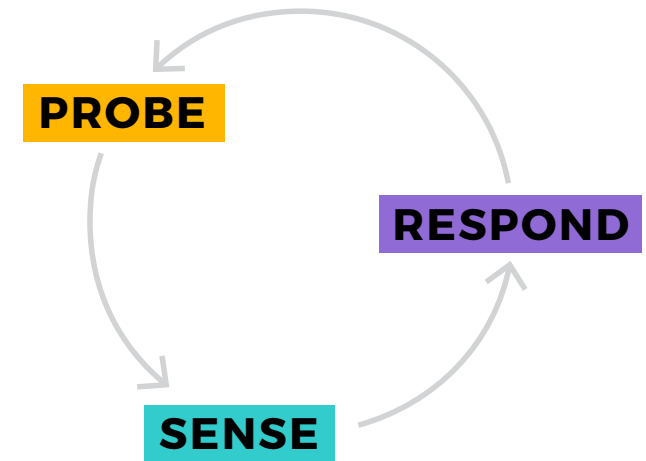
When our aim is to transform the system, we need to explore and understand the whole system including its many components, players and the relationships between them.

Because systems are complex and dynamic, it requires us to embrace a process of real world experimentation, learning and adaptation.

Most of today’s major crises are tied up within complex economic, political and social systems; they are global and deeply cultural. To understand these complex systems and how we can create change and transform them we need to take an approach that is based on probe-sense-respond. We probe the system by creating experiments and testing assumptions. We sense by listening, evaluating and integrating feedback from our experiments into our understanding of the system. And we respond by changing our experiments and adapting our strategy or scaling what is working to disrupt and transform the system.

This approach is built into the Campaign Accelerator process by exploring what we currently know about systems, challenging our assumptions, generating ideas and seeking feedback and adapting ideas. It is also an approach that needs to continue long after the Campaign Accelerator process in order to create systemic change.

To learn more about a systems approach to campaigning see SmartCSOs report [Reimagining Activism](#), or the Greenpeace (draft) [systems campaigning toolkit](#).



## Why do we integrate design thinking in the process?

**As organisations we regularly tackle complex issues that are the result of dysfunction in larger systems including poverty, environmental destruction, inequality and violence, and design thinking offers advantages for working within complex and dynamic environments.**

Design thinking has earned a reputation for generating innovative new products and services. We're seeing the methodologies spread quickly throughout the international aid and development sectors, and the NGO / advocacy worlds are beginning to take note as well.

Design thinking has its roots in professional design traditions including ways of thinking and working. In order to engage non-professional designers in the process of design, these traditions have been simplified into a set of practices or tools and popularised under the terms “design thinking” and “human-centred design.”

Design thinking requires cognitive skills other than deduction and induction, and this can sometimes be uncomfortable new territory for staff from NGOs which are more commonly influenced by scientific traditions. Yet as with any new skill, with practice and experience this approach can become natural or automatic.

We have integrated design thinking practices into the Campaign Accelerator because it is a process designed to tackle complex problems — problems where the solution is not known from the beginning. Design Thinking is a solution-focused process, one that recognises many possible solutions exist, and as we design solutions and experiment, we also learn more about the problem.

Adapting and including a design thinking approach in campaign planning develops empathy with audiences, challenges assumptions, and helps us better understand people's challenges and needs. The process includes field research and interacting with key audiences to uncover what inspires action. Gaining empathy helps remove the barriers between ‘us’ as staff and ‘them’ as people we wish to engage. This creates inspiration for innovation and greater creativity in our campaigns.

Design thinking uses prototypes to gather direct feedback on how and why people engage in and interact with campaigns. The process of prototyping, getting feedback and iteration is an essential part of the process and evolution of the solution. It also frees teams up to try wild ideas while minimising risks. Free from failure, participants find courage to try new things rather than sticking to what they already know.

There are many resources available online to learn more about design thinking, including free online courses from [Acumen and IDEO.org](#).



## How to use this guide

**This process was created and optimised for project teams to turn around plans quickly — to spend less time planning and more time campaigning.**

It works best for developing specific projects within a wider campaign. Teams should have completed their basic research and have a good understanding of the problem they are tackling and the context of the problem, even if they don't know their specific strategy yet.

Whether you're using this for a totally new campaign or to reinvigorate an existing campaign, you'll need to have a clear idea of what you want to get out of the process at the end so that you can adapt the process to meet those specific needs.

Each exercise comes with step by step instructions based on what we found works best with teams; you might have better ideas. Take inspiration from this, adapt it as necessary, and make it work for your team. Always keep your outcomes in mind. The process, methods and tools should serve the outcomes you need.

You may find some of these tools and methods useful for long term planning, or at specific points during implementation. It's up to you how to use them and when. We hope this guide will provide you with inspiration and a useful toolkit to create more responsive, people powered and impactful campaigns that spark system transformation.

## What the Campaign Accelerator will not do

This toolkit will not deliver answers to all your questions or cover all the work you may need to address in the life of your campaign. (Sorry!) The process is about accelerating your planning and launching people-powered campaigns more quickly — which should allow you to learn from your campaign activities and adapt plans based on your experience.

The Campaign Accelerator probably won't replace all of your current campaign planning tools, templates and methods; hopefully it can supplement them, complement them and provide your team with some new ways of working to supercharge your campaigns.

## With Gratitude

This guide is only possible because of the great work that has come before it. We are grateful for the inspiration and guidance these organisations have provided: Fantastic Studios, Greenpeace Response Lab, Grove Consultants International, Hyper Island, IDEO.org, Kaospilots, Nesta, SmartCSOs, Strategyzer and Greenpeace Mexico for providing incubation space.



# Module 2: Sense

## Where are we?

Module 2: At this point you should have defined your challenge, have an idea of possible strategies and key stakeholders and audiences you need to engage and mobilise.

## Purpose

To build a deeper understanding of and empathy with the specific audiences we need to engage and conduct field research to provide inspiration for how we can motivate and engage those audiences to be part of the solution.

## Outcomes

At the end of this stage you should have insights about each of the audience segments for your possible strategies. This may enable you to take decisions about strategies, narrow audience focus and it will provide you with a solid base from which to proceed to idea generation.



**HOW TO USE THIS GUIDE:** This guide is intended to bring together tools to help us integrate people centred campaigning into our plans. This is a living document. We want you to try these tools, test them, adapt them and to share your learnings with your colleagues and with us so we can improve on the guide. If you have feedback on this guide please email: [accelerator@mobilisationlab.org](mailto:accelerator@mobilisationlab.org)



# What is Sensing?

Harnessing the potential of people power requires a deep understanding of the people we seek to engage in campaigns. What inspires and motivates them? What are their emotional and practical needs? During the sensing phase you will learn directly from the people you want to campaign with in order to design campaigns that have the greatest potential to involve people in change.

## The purpose of Sensing is to:

**UNDERSTAND** the people, trends and technologies shaping society that can be relevant to help solve our challenges.

**LEARN** directly from people by observing, engaging and interacting with them.

**EMPATHISE** to uncover emotional needs, dreams, frustrations, motivations and barriers for taking action.

**INSPIRE** ideas that will engage people in our challenge.

## After conducting sensing you should have:

Confirmed or challenged **ASSUMPTIONS** you made about the people you want to engage.

Identified **INSIGHTS** for each audience or group of people.

Gained **INSPIRATION** for creating solutions relevant for your audiences.

## KEY PRINCIPLES

- Get away from the desk and out of the office
- Observe behaviors and trends
- Meet people and develop empathy to get insights from target groups



## SECTION 1:

# Sensing Prep

The four exercises in this section will prepare you to begin audience research by helping you think through who you want to speak with, looking at the issue from their perspective, and thinking about what, specifically, you want to gain insight into based on your research.

You will not need to do all of the exercises in this section, however you will need to do enough preparation to be clear about who the audiences are that you want to learn more about, and what questions you need answers to before you set out for your sensing.

YOU ARE IN SENSING PREP

CAMPAIGN ACCELERATOR TOOLKIT

DEFINE

SENSE

CREATE

PROTOTYPE & TEST

PLAN & PITCH

6



## Exercise 1:

# Persona

**CORE FUNCTION: YES**

**CORE TOOL: YES**

### Level of difficulty:

Low

### Time:

15-20 minutes

### People:

2-5

### Materials:

Blank paper or template, markers

Creating a persona is not a rigorous, research-based process, but it can help to define your key audiences, see the issue through their eyes and help you identify questions for your audiences in the research phase.

### Purpose of this exercise:

Quickly focus on how people relate to the problem you're addressing, what you need to learn, and the assumptions you're making about your audiences.

### Expected outcomes:

A guess at what your key audiences might be thinking and feeling about your issue.

### Expected Campaign Canvas outcome:

None.

### How this exercise leads to the next section:

Once you create your persona(s), you'll be able to think more clearly about what you want to get from those people.

### Facilitation Pointers:



After your research you can update your persona and use it to help identify assumptions you might have made that you need to reconsider.

YOU ARE IN SENSING PREP



## Step by Step:

- 1** You can draw the “template” on a sheet of paper with the titles for each section or print it out.
- 2** Split your group into small groups of 2-3 participants, and ask each group to give the person a name and some basic demographic info and draw them in the upper left-hand corner.
- 3** Ask each group to describe — from the person’s point of view — what their experience of the issue is for each of the categories starting from seeing through to doing.
- 4** The goal of the exercise is to create some empathy with the person or audience segment and see the issue through their eyes.
- 5** It is also good for identifying questions for research where uncertainties remain.



Figuring out their persona.



# Persona Worksheet

Draw Persona

See and hear about the issue?

Think and feel about the issue?

Say and do about the issue?

Audience Group

Name

Age

Occupation

Relationship Status

Location

Places They Frequent

Bio

Life goals

Core values

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[Download A4 Template](#)  
[Download A1 Template](#)

YOU ARE IN SENSING PREP



## Exercise 2:

# Framing

**CORE FUNCTION: YES**

**CORE TOOL: NO**

If you have another way to answer these questions, that's fine.

 **Level of difficulty:**

Medium

 **Time:**

30 minutes

 **People:**

Individually or in a small group

 **Materials:**

Pens, paper, template

### Purpose of this exercise:

Exploring uncertainties and assumptions you have about the people you wish to engage and how they might view you, the problem you wish to address, and/or your strategy, prior to crafting specific questions.

### Expected outcomes:

You have identified the big question(s) you want to explore with each of your priority audiences.

### Expected Campaign Canvas outcome:

None.

### How this exercise leads to the next section:

You have to know your broad goals for sensing in order to formulate more specific questions.

### Facilitation Pointers:



Don't worry too much about the specifics here, the basic idea is: What are the main questions into which we need insight?



Your groups may dive straight into interview questions during this exercise. That isn't too problematic, but one way to avoid is to provide this and the interview question worksheet at the same time.

YOU ARE IN SENSING PREP





## Step by Step:

- 1 You can mind map or create a list.
- 2 Start by writing down the big areas you might want to explore: your strategy, the problem you're trying to solve, your key audiences, etc.
- 3 For each, map out the biggest uncertainties and assumptions you have, with specific focus on uncertainties and assumptions that your key audiences could help you understand.
- 4 Circle those that are most important to resolve to further refine and improve your strategy.



Framing the overall sensing exercise.



# Framing Worksheet

## WHAT DO YOU WANT TO KNOW?

The first step is to set the focus on what you want to explore.

A. List or mindmap possible areas of inquiry to explore in your sensing.  
B. Select (circle or underline) key topics to explore.

List/Mindmap Issues



**NOTE:** Links to download all the templates can be found at the end of this document.



## Exercise 3:

# Persona Role Play

**CORE FUNCTION: YES**

**CORE TOOL: NO**

Best for people who are new to sensing.

 **Level of difficulty:**

Medium

 **Time:**

20-30 minutes

 **People:**

In pairs or their small sensing team

 **Materials:**

Pens, paper

## Purpose of this exercise:

To develop or refine a list of interview questions for sensing through action based learning and build participants' confidence about having conversations with strangers.

## Expected outcomes:

A list of questions for each of your key audiences that worked well to get reflective and insightful answers. And a list of questions that perhaps didn't work as well.

## Expected Campaign Canvas outcome:

None.

## How this exercise leads to the next section:

The questions asked will directly inform the insights you get.

## Facilitation Pointers:



Just jump in! participants could spend time coming up with what looks like a perfect list of questions, but they'll have a better sense of the potential to draw out deep insight if they ask their questions out loud and listen to responses.



If participants get stuck for the next question, asking "why?" or saying "tell me more about..." will help them probe deeper.

YOU ARE IN SENSING PREP



## Step by Step:

- 1** In pairs or small sensing teams, agree who will be the first to play the role of the persona you created.
- 2** The interviewer begins by asking questions about the issue and the aspects they want to know. Whatever questions come to mind. The interviewer listens attentively - you do not need to write down what they say. If you have an observer, they should write down each question asked by the interviewer and make note of questions that provoke interesting responses.
- 3** After 10-15 minutes, debrief on the interview. Think about what were the most useful answers or information that came up from the interviewee? What questions helped to draw this information out? Write a short list of your top questions.
- 4** If you have time, swap roles and do a second round. You can start with your list of top questions and continue to adapt based on the responses to your questions. Finish by debriefing and refining your list of questions.



Practicing questions.



## Exercise 4:

# Questioning Guide

**CORE FUNCTION: YES**

**CORE TOOL: NO**

You can do this without the template if needed.

### **Level of difficulty:**

Easy



### **Time:**

30-60 minutes



### **People:**

1-3 people



### **Materials:**

Pens, paper, template

### **Purpose of this exercise:**

Creating an outline of questions for your interviews.

### **Expected outcomes:**

List of questions to ask each of your target groups to kick off the interview and provide guidance.

### **Expected Campaign Canvas outcome:**

None.

### **How this exercise leads to the next section:**

The questions asked will directly inform the insights you get.

### **Facilitation Pointers:**



The interviews themselves rarely follow any sort of script; make sure folks know this is to help them think through what they'd want to ask, rather than a sheet they should read off of.

YOU ARE IN SENSING PREP



## Step by Step:

- 1** Start by listing each of your target audiences or stakeholders under the “who” column.
- 2** Start your thinking of specific questions that are easy for people to answer. These are conversation starters. List them under “start specific” for each target group.
- 3** Now think of questions that would invite your interviewee to tell you a story. These could be questions that start with “what was your best experience...” “what is your favourite memory of..”
- 4** Finally what can you ask to investigate and go deeper to understand people’s motivations, emotional needs and barriers. Questions that start with “why” or “tell more more about...” help to go deeper.

YOU ARE IN SENSING PREP



# Questioning Worksheet

## WHAT TO ASK WHO

The art of interviewing and asking questions...one way to do interviews is to follow a flow (similar to idea development).  
A good way to plan your interview flow could look like this: START SPECIFIC - GO BROAD - PROBE DEEP.

### WHO?

### START SPECIFIC!

(Conversation starters, interesting yet simple questions)

### GO BROAD!

(Open up for stories, use conversation-like questions)

### PROBE DEEP!

(Investigate why, X5)

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**NOTE:** Your question list is a guide, the most important thing is to really listen to your interviewee and ask follow up questions that allow you to understand the “why”.

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[Download A4 Template](#)  
[Download A1 Template](#)

## YOU ARE IN SENSING PREP



# What makes a good question?

Questions get us information, generate emotions and also affect the situation — they can focus the interviewee, shift their flow of thoughts (or stop it). Some questions can even prevent us getting the info we need!

Start with your end in mind. We want to gain new knowledge that will help us develop creative ideas for the campaign. More than facts - we want to understand feelings, challenges, barriers, and motivations.

**Ask open questions** - questions that start with what, how, why

**Ask neutral questions** - don't give away your opinion, reserve judgement to get honest answers

**Go broad** - you don't need to go directly to the problem you're investigating, what questions could you ask that might get them to bring up the issue? This will give you a better sense of their perspective and the importance of the issue to them.

**Go deep** - How can you draw people deeper with questions or stimulus?

## QUESTION TIPS

- Make the first question easy
- Move from general to specific
- Ask “why?” – even if you think you know the answer
- Silence allows your interviewee to collect their thoughts and encourages them to share more
- Don't ask leading questions.
- Don't ask multiple questions at once.
- Probe, ask again, rephrase when you feel there is more to the answer.

YOU ARE IN SENSING PREP





## SECTION 2:

# Sensing Methods

Here are six of the most common types of audience research, along with our recommended note-taking template. The sensing methods are geared more toward pop-up research and interviews, but if you have the time and capacity to try out other methods please do! And if you want to learn about more methods, check out *Field guide to Human-Centred Design* by IDEO.org

YOU ARE IN SENSING METHODS

CAMPAIGN ACCELERATOR TOOLKIT

DEFINE

SENSE

CREATE

PROTOTYPE & TEST

PLAN & PITCH

19



## Sense Method 1:

# Pop-up Research

### CORE FUNCTION: **YES**

(It's important to do at least one of these methods)

### CORE TOOL: **NO**

#### **Level of difficulty:**

Easy

#### **Time:**

A few hours

#### **People:**

In pairs ideally, one person to interview, one to take notes and photos

#### **Materials:**

Pen & paper / notepad for notes, phone for photo/video

### Purpose of this method:

A quick and easy way to get to know audiences and understand if you have the right target audiences.

### Expected outcomes:

You will have conducted quick interviews with a number of people representing your target audience along with notes for each interview that covers their beliefs, needs and challenges concerning the problem you are tackling.

### How this method leads to the next section:

You'll use this research to generate insights.

### Facilitation Pointers:



Before leaving to do research, make sure folks have printed off enough copies of the interview worksheets (1 per interview, on pg. 102), and an insights worksheet to complete after they've finished their research (pg. 121).

YOU ARE IN SENSING METHODS



## Step by Step:

- 1 Identify where to find your target group.
- 2 Go equipped with a question guide (pg. 95), at least 5 interview worksheets (pg. 102), and an insights worksheet (pg. 121), along with pen or pencil for notes.
- 3 Find a place where people naturally would stop (a cafe, ATM, smoking area, bus stop) where it will be easier to have a short conversation.
- 4 Spend about 10-15 minutes per individual informally asking your questions or asking their opinion.
- 5 Take notes (for this it is good to be in pairs, one for notes and one for the interviews), and also take pictures (if you have their permission)!
- 6 Do a debrief immediately after each interview to identify your key findings, and to see if you are getting the information you need or if you need to make improvements to your questions or shifts to who you are speaking with.



An example of a pop-up research interview.



An example of a pop-up research interview.

### YOU ARE IN SENSING METHODS



## Sense Method 2:

# Interviews

### CORE FUNCTION: **YES**

(It's important to do at least one of these methods)

### CORE TOOL: **NO**

#### **Level of difficulty:**

Easy



#### **Time:**

30-50 minutes per interview



#### **People:**

1-3 people per interview team



#### **Materials:**

Pens, paper/note pad question guide, phone for photo/video

### Purpose of this method:

Understanding and gaining empathy with your target audiences, particularly their emotional needs, motivations and barriers.

### Expected outcomes:

You will have conducted more in depth interviews with a number of people representing your target audience. You will have detailed notes and observations for each interview.

### How this method leads to the next section:

You'll use this research to generate insights.

### Facilitation Pointers:



Find patterns. Look for themes and threads through interviews.



Listen. Really absorb what people say and how they say it without thinking about a response.



Ask follow up questions to go deeper.

YOU ARE IN SENSING METHODS



## Step by Step:

- 1** Try to conduct interviews in people's space or a place that they are comfortable. You can learn more about a person by talking to them where they live, work or spend their time.
- 2** No more than three people per interview team so you don't overwhelm them. Be clear about roles, who is interviewing, taking notes, observing.
- 3** Go prepared with a set of questions (you can use the question template on previous pages).
- 4** Write down exactly what the person says, not what you think they mean. It's important to hear what they are saying and have direct quotes.
- 5** What you hear is only one point of information. Make sure to observe body language, expressions, interactions with the environment, etc. Write it all down.
- 6** Take photos or video if you have permission. This will help you to recall the interview in future and share your findings with colleagues.
- 7** Debrief immediately, while the interview is still fresh in your mind. Use the observations and interpretations worksheet to record key findings or observations.
- 8** You should also debrief on how the interview went. Can you make any improvements to the questions or the way the interview was conducted for your next one?



# Interview Worksheet

**DEBRIEF AFTER EACH INTERVIEW...**

Name

Demographics

**WHAT DID YOU OBSERVE AND WHAT ARE YOUR INSIGHTS?**

OBSERVATIONS & QUOTES

INTERPRETATIONS

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**NOTE:** Don't judge.  
Question everything  
(Ask Why? Why? Why?...) Be Curious.

**NOTE:** This worksheet could be used for both Interviews and Pop-up Research.



## Sense Method 3:

# Immersion

### CORE FUNCTION: **YES**

(It's important to do at least one of these methods)

### CORE TOOL: **NO**

#### **Level of difficulty:**

Difficult



#### **Time:**

A few hours to a week



#### **People:**

2-3



#### **Materials:**

Pen, notepad, equipment to record, take photos & video, possibly travel & accommodation

### Purpose of this method:

To learn about the target groups' experience first hand and gain empathy through observations and immersion.

### Expected outcomes:

There's no better way to understand your audience than immersing yourself in their lives and communities. You should have detailed notes about what you observed along with photos and video if possible.

### How this method leads to the next section:

You'll use this research to generate insights.

YOU ARE IN SENSING METHODS



## Step by Step:

- 1** As you create your project plan, budget enough time and money to send team members to the field to spend time with your target group. Try to organise to stay with the people you wish to understand so that you can observe them as they cook, shop, socialise, commute — whatever is relevant to your challenge.
- 2** Once you're there, observe as much as you can. Record exactly what you see and hear including quotes along with your impressions.
- 3** Shadowing a person for a day is a great way to understand and empathise with them. Ask them all about their lives, how they make decisions, watch them at work, with their friends and family and relaxing.
- 4** If you have less time you can also learn a lot by shadowing someone for a few hours.

### YOU ARE IN SENSING METHODS





## Sense Method 4:

# Talking to Extremes

### CORE FUNCTION: **YES**

(It's important to do at least one of these methods)

### CORE TOOL: **NO**

#### **Level of difficulty:**

Moderate



#### **Time:**

30-60 minutes



#### **People:**

2-3 people per interview team



#### **Materials:**

Pen, notepad, debrief sheet

### Purpose of this method:

Talking to people with extreme views or super users is a good way to gain new insights from the extreme ends of the spectrum on the issue and spark creativity.

### Expected outcomes:

Gain new insights from the unique perspectives of those who are closest to issues or who have extreme views with detailed notes from the interviews.

### How this method leads to the next section:

You'll use this research to generate insights.

YOU ARE IN SENSING METHODS



## Step by Step:

- 1 Think about the different people who might have a view on the issue. Extremes can fall on a number of spectrums and you'll want variety. Each view on your issue can inspire new thinking.
- 2 When you talk to extremes ask them questions that reveal why they have an extreme view and try to understand how that differs from mainstream views and why.
- 3 You can use your contacts to arrange individual interviews. You might even stumble across an extreme view in your other research and take the time to understand how they are different.
- 4 Be sensitive to extremes when you interview them. They may often feel left out of discussions like these so make them feel welcome and that their voices are critical to your research.



## Sense Method 5:

# Self-documentation

### CORE FUNCTION: **YES**

(It's important to do at least one of these methods)

### CORE TOOL: **NO**

#### **Level of difficulty:**

Moderate

#### **Time:**

2 - 30 days

#### **People:**

Project team and 5-10 people who will self-document



#### **Materials:**

Pen, notepad, debrief sheet

### Purpose of this method:

To understanding community life through the eyes of community members and when you can't be there. Records of experiences, through photos or journal entries, allow you to see how people see their life, community, and relationships.

### Expected outcomes:

Photos, drawings or written entries, or a combination of these, by a member of the community you wish to engage or work with. This could also include discussions with the participants in the research to interpret their creations.

### How this method leads to the next section:

You'll use this research to generate insights.



Be conscious of who has access to what in a community or environment. Recruit both men and women for this exercise to have a balance of perspectives. Also be sensitive to class, age, and other factors that will affect the information people are able to record.

YOU ARE IN SENSING METHODS



## Step by Step:

- 1** Based on the problem you are trying to solve, decide what you would like people to document -- their surroundings, activities, home, family life, feelings or behaviors. Then decide the best way to collect this information: photos, journal entries, drawings, voice recordings...
- 2** Recruit several people and give them what they will need to record their lives - cameras, video cameras, voice recorders or journals, with instructions.  
Ask them to document their experiences over a few days or weeks. Give participants simple instructions that will guide them to record the activities you are most interested to learn more about. Include guidelines for how often to record and how long it should take. The easier it is to self-document, the more likely it is that participants will complete the exercise.
- 3** At the end of the research period, review the materials together. Ask them not only what they documented, but also why they chose these things to record and how they felt about the items. Remember to take detailed notes.
- 4** Be sensitive to extremes when you interview them. They may often feel left out of discussions like these so make them feel welcome and that their voices are critical to your research.



You may find that research participants need a bit of help practicing self-documentation. Provide some examples of how other people have done self-documentation, or spend a few hours with the participant to show them how to capture information to put them at ease and build confidence in the method.



## Sense Method 6:

# Conversation starters

### CORE FUNCTION: **YES**

(It's important to do at least one of these methods)

### CORE TOOL: **NO**

#### **Level of difficulty:**

Moderate



#### **Time:**

30-60 minutes



#### **People:**

2-3 people per interview team



#### **Materials:**

Pen, notepad, 3-5 'conversation starters'

### Purpose of this method:

Use props - images, ideas, materials from other campaigns, news articles - to begin a dialogue or get a reaction around the problem you are investigating.

### Expected outcomes:

Detailed notes from your interactions that provide insight based on how people see the current imagery and stories about the issue.

### How this method leads to the next section:

You'll use this research to generate insights.

### Facilitation Pointers:



As well as using existing imagery, campaigns and news articles, you can also present campaign ideas to get a reaction. The ideas you use for conversation starters are sacrificial, don't get attached to them, if they don't work, drop them and move on.



Be aware that high profile stories or well known imagery may get a different reaction than similar imagery or materials your audience has never seen before because they may already have formed an opinion based on what they have seen or heard before. Make sure the props fit what you want to sense for.

YOU ARE IN SENSING METHODS



## Step by Step:

- 1 Based on the problem you are investigating, determine what materials or props you can use as conversation starters on the issue. If you want to use ideas to start the conversation come up with a list of as many different ways as you can to solve the problem.
- 2 Once you have identified someone from your key audience, ask them for their reactions to these images, articles, ideas - whatever conversation starters you are using. Some may be serious, some may be absurd, you're only looking to get their opinions.
- 3 When they share their opinion, be open to however they interpret the conversation starters. Feel free to ask more questions to better understand their reaction and opinions.
- 4 Once you have gone through all of your conversation starters, ask them which one they feel the greatest connection with and why? Which one do they like the least and why?

YOU ARE IN SENSING METHODS



## SECTION 3:

# Making Sense

This section offers tools and methods to take what your team gathered during their research, turn it into useful, usable insights, and then transform those insights into focus questions you can use for creative idea development.

For participants with marketing experience creating insights may be straightforward, however for people new to audience insights it may take time to make sense of their research and distill notes into useful insights. The exercises here help participants make sense of their sensing research and develop insights regardless of previous experience.

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CAMPAIGN ACCELERATOR TOOLKIT

DEFINE

SENSE

CREATE

PROTOTYPE & TEST

PLAN & PITCH

33



# What is an Insight?

Insights are concise expressions of what you have learned from your sensing. They are the “aha” moments and unexpected learnings.

An insight seeks to understand **‘the why’** rather than ‘the what’. Why do people think the way they think, or do the things they do?

Data and observations tell us the way the world is. Insights look at **why the world is that way**. Knowing why often means understanding emotional needs, motivations and barriers that we hope to unveil and meet with messages and actions.

## Insights should be:

**DEEP** - go beyond what is said and done

**DIRECTIONAL** - you can take action on it

**RESONATE** - it strikes a chord with people - it's relevant, evokes imagery or emotions and agreement

**A good test for an insight is whether it gives you ideas to solve your problem.**

Insights are fuel for idea development and building blocks for Focus Questions (pg. 123).

## INSIGHTS CAN ALSO BE EXPRESSED AS POINT-OF-VIEW (POV) STATEMENTS.

- Makes an insight specific to a person or target group.
- Person + barrier/motivation + interesting learning = POV
- Tech workers + want opportunities to innovate & create solutions together + believe that technology can make the world better.
- Young professional women + want nutritious & good quality food + believe good quality food is more expensive and will pay for it.





## Exercise 1:

# Audience Stories

**CORE FUNCTION: YES**

**CORE TOOL: NO**

### **Level of difficulty:**

Moderate

### **Time:**

30-60 minutes

### **People:**

Project team

### **Materials:**

Markers, post-its, flip chart paper

## **Purpose of this exercise:**

Sharing interviews, experiences and observations to capture insights and build a repository of inspirations for your creative work.

## **Expected outcomes:**

A small number of statements - these can be observations, needs, desires, challenges, opinions, interpretations - that came up repeatedly across several interviews and stood out in terms of relevance and information you can act on.

## **Expected Campaign Canvas outcome:**

None.

## **How this exercise leads to the next section:**

This is one good way to start surfacing insights.

## **Facilitation Pointers:**



This can be a really fun way to regroup once everyone comes back; you can make this informal/chatty as well.

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## Step by Step:

- 1** Each team member tells their most compelling stories from their field research. Try to be both specific and descriptive. Report on who, what, when, where, why and how.
- 2** As you listen to your teammates' stories, write down notes and observations on post-its. Use concise and complete sentence that everyone can understand. One per post-it. Capture quotes, needs, barriers and observations.
- 3** Then put all post-its on the wall or flip chart paper and organise them into themes or categories.
- 4** Repeat with stories from all team members, keeping post-its from each story on a separate flip chart paper or area of the wall with a title describing the person interviewed or field research experience.
- 5** At the end you will have a many sheets lined up on the wall with perhaps hundreds of post-it notes. You can now use the “5 Loudest Statements” (pg. 115) or Finding Patterns and Themes (pg. 117) to identify key lessons.

### YOU ARE IN MAKING SENSE



## Exercise 2:

# 5 Loudest Statements

**CORE FUNCTION: YES**

**CORE TOOL: NO**

### **Level of difficulty:**

Easy

### **Time:**

30-60 minutes

### **People:**

Project team

### **Materials:**

Post-its, markers, flip chart or wall space

### **Purpose of this exercise:**

Help you to prioritise the insights you gained during different phases of interaction with your audience.

### **Expected outcomes:**

A list of 5 of the most common, relevant and actionable insights.

### **Expected Campaign Canvas outcome:**

None.

### **How this exercise leads to the next section:**

This is another good way to surface insights from your research.

### **Facilitation Pointers:**



You can combine this method with others to get your “loudest” insights from the combined research.

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## Step by Step:

- 1 Gather the team and get everyone to individually write down their 5 top insights from any exercise or interaction.
- 2 Each team member shares their ideas and sticks them on the wall.
- 3 Cluster the similar ideas and see what jumps out.
- 4 This can be done at various points throughout the process and be sure to keep your post-its so you remember them!



### Exercise 3:

# Finding Patterns & Themes

**CORE FUNCTION: YES**

**CORE TOOL: NO**

#### **Level of difficulty:**

Moderate

#### **Time:**

60 minutes

#### **People:**

Project team

#### **Materials:**

Post-its, insights or notes from previous sessions, whiteboard or flip chart.

#### **Purpose of this exercise:**

Spotting common themes from the interviews, idea generation sessions or insights you gathered.

#### **Expected outcomes:**

A short list of refined insights that represent patterns or themes that stand out from your array of notes and insights.

#### **Expected Campaign Canvas outcome:**

None.

#### **How this exercise leads to the next section:**

This is yet another way to surface insights that you will use to build focus questions for your creative workshop.

#### **Facilitation Pointers:**



You don't need to do all of these, so long as the group can reach consensus on what the loudest insights were in relationship to the questions you began with.

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## Step by Step:

- 1** Gather all the notes, post-its, inspiring quotes and ideas from previous sessions you have run.
- 2** Begin to plot the interesting ones on a wall or board and categorise them as you wish.
- 3** Start to look for patterns or similarities and move around the postits as you want.
- 4** Discuss, debate and keep moving them until you have some clear patterns that could give direction to your strategy and creative direction.

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## Exercise 4:

# Insight Statements

**CORE FUNCTION: YES**

**CORE TOOL: YES**

### **Level of difficulty:**

Moderate

### **Time:**

60-90 minutes

### **People:**

Project team

### **Materials:**

Pens & paper

## **Purpose of this exercise:**

Transforming learnings and interpretations from your conversations and interactions with target audiences into key insights. These are the building blocks for creating Focus Questions for your creative workshops.

## **Expected outcomes:**

A set of concise sentences of your key insights from your sensing methods.

## **Expected Campaign Canvas outcome:**

Once you fit it all together, you might wind up with revised thinking on some of what you've already put in the Canvas from earlier, and you may have a better idea of some risks and assumptions.

## **How this exercise leads to the next section:**

Formulating all of your insights into Insight Statements is a necessary step to create focus questions and put the research to direct use.

## **Facilitation Pointers:**



Make sure not to skip the final step — checking to ensure that the insight statements actually convey a new perspective or something useful about the problem and target audience.

YOU ARE IN MAKING SENSE



## Step by Step:

- 1 Identify the key overarching themes that came out of your interviews or research.
- 2 Take each theme and try to rephrase it as a short statement — the core of the theme or the insight. Try using the POV formula on page 79 if you are stuck.
- 3 Once you have a list of these statements go through and prioritise based on what you are trying to achieve — your initial challenge. You should end up with 3-5 top insight statements.
- 4 Go back and recheck them — make sure they convey a new perspective or something useful about the problem and target audience.

## TIPS FOR WRITING INSIGHTS

There are no right or wrong ways of writing an insight but the following tips may help you to find a good way to articulate it.

- Keep to one sentence
- Be clear and single-minded
- Imagine it as a statement spoken by the people themselves
- Think about starting the sentence with “I...”
- Use people-centric language – not campaign language
- Express the emotional factors that lead to behaviour
- Choose verbs like “want” “need” “wish” “love” or “believe”





# Insight Statements Worksheet

Interview Team:

## WHAT ARE YOUR INSIGHTS?

INSIGHTS are a concise expression of what you have learned from your research and inspiration. They are the “AHA” (or even “HAHA!”) moments and unexpected learnings.

### REMINDER

POINT-OF-VIEW (POV):  
Makes an insight specific to a person or target group.  
PERSON + BARRIER/MOTIVATION + INTERPRETATION = POV

### INSIGHTS

5-10 KEY INSIGHTS FROM ALL YOUR INTERVIEWS

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# What are Focus Questions?

We combine **goal + strategy + audience insights** to create a starting point for idea generation, called **Focus Questions**.

Focus Questions can narrow down, broaden or deepen our original goal and strategy into a compelling question that begs to be answered. A good focus question will leverages the new findings from your sensing work and can help you articulate a first draft of your project goal.

Focus questions provide a direction and begins to outline the contours of a 'solution space' that will be your springboard for generating many new ideas.

## Before creating focus questions, you need to understand:

**The challenge** – What are we trying to change, the goal, the outcome?

**The desired outcomes** – What type of ideas are we looking for? How ambitious? Any other criteria? Who decides and how?

**The workshop situation** – How much time? Where are they in the process? What participants and how many?

You should then generate a quantity of “How might we” questions from your current understanding of the challenge and insights. Test them out to see if they immediately create ideas for a solutions. Select those that generate many ideas of the type that meets your campaign challenge.

## FOCUS QUESTION BASICS

- Starts with “HOW MIGHT WE”? (action and many possibilities)
- Build focus questions from insights to increase relevance.
- Positive formulation
- Engaging and simple
- Open
- Directional (what's the result?)
- Well formulated insights will ensure smooth focus question development



## Exercise 5:

# Focus Questions

**CORE FUNCTION: YES**

**CORE TOOL: YES**

### **Level of difficulty:**

Moderate

### **Time:**

60-90 minutes

### **People:**

Project team or smaller team

### **Materials:**

Insight statements, pens, paper

### **Purpose of this exercise:**

Translating your insights into opportunities to design solutions by reframing them as “how might we” questions.

### **Expected outcomes:**

“How might we...” questions for your challenge and target audiences. These questions are used at the beginning of idea generation and development to frame the challenge and offer participants the opportunity to answer the question in a variety of ways.

### **Expected Campaign Canvas outcome:**

Your focus question is a draft of your goal for box 7. If you already have a draft of your goal you can also use this to help craft your focus question.

### **How this exercise leads to the next section:**

This is the start of idea generation.

### **Facilitation Pointers:**



Make sure you take the time to get this right; it might be better if done by the facilitation team and then checked with the broader group, rather than as a full group activity.

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## Step by Step:

- 1** Start by creating focus questions based on your strategy, audiences and what you want to achieve with the project. Write many different versions to explore the format and the best way to phrase a question that will generate ideas.
- 2** Now try to integrate your insight statements rephrasing them as part of the “how might we” formula to create questions. Try different ways of rephrasing each of your insights and goal into How might we questions.
- 3** Now take a look at your questions and which ones allow for a variety solutions? It can be tricky, the best way to know if your question will work is to try it yourself in your small team. What kind of ideas does the question inspire? Does the question take you in the direction of ideas that will solve your challenge?
- 4** Your final selection shouldn’t be too broad, it needs to be narrow enough to frame your challenge, yet also open up for wild ideas.

### “How might we...” formula:

How might we **(ACTION)** **(NOUN)**  
**(QUALIFIER)** **(END RESULT)**?

How might we **involve** **tech workers**  
**to co-create innovative solutions and**  
**sustainable tech-products?**



# Focus Questions Mash-Up Worksheet

**MASH-UP**

General / open focus questions can become more specific / inspiring / useful / relevant if you mash them up with things you've found in your research and sensing process

**INSTRUCTION**

1. Write FQs

2. Write insights, trends or tech

3. Mash-up by combining columns and rows and fill out the grid with new focus questions

	FQ1	FQ2	FQ3
<div><div><div><div>INSIGHT, TREND OR TECH</div><div></div></div><div></div></div></div>			

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# Focus Questions Formula Worksheet

## FQ FORMULA

Formulating a useful focus question can be easier with a bit of structure.  
Structure the focus questions using the FQ formula: "How might we (ACTION) (OBJECT) (QUALIFIER) (END RESULT)?"

	ACTION	OBJECT	QUALIFIER	END RESULT
HOW MIGHT WE...				?
				?
				?
				?
				?
				?

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## Exercise 6:

# Campaign Canvas

**CORE FUNCTION: YES**

**CORE TOOL: YES**

### Level of difficulty:

Easy

### Time:

You can use this to slowly build a picture of your plan over time as you complete the exercises in this guide.

### People:

Project team

### Materials:

Draw or print the campaign canvas and use sticky notes so you can make changes as your plan is refined.

### Purpose of this exercise:

Putting it all together and creating a quick outline of your project plan and as an ongoing tool to track, respond and adapt to changes that affect your strategy or plan.

### Expected outcomes:

At this point you should have a first draft (in the form of post-it notes) on the canvas template boxes 1 through 5, possibly 6. These will continue to be refined throughout the five modules so don't worry if they are not perfect.

### Expected Campaign Canvas outcome:

If you introduced this at the start and have been filling in as you go along, you might already be there, or you could take this moment to pause and reflect on what you have come up with during each exercise and add outcomes to the canvas.

### How this exercise leads to the next section:

None of note.

### Facilitation Pointers:



If you haven't done this many times, you might want to introduce the Canvas earlier, to provide everyone with a bit of a roadmap. You can also wait to unveil until later on if you'd prefer.

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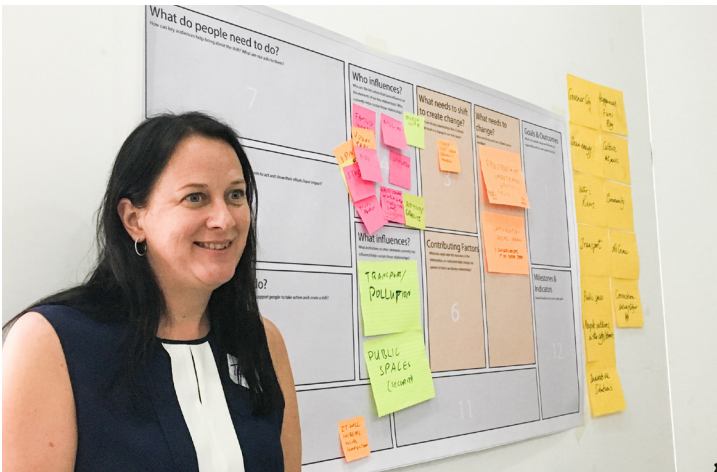


Step by Step:

- 1 Update your canvas with what you have learned during the sensing phase. Have your ideas about your audiences changed? Have you verified assumptions or uncovered new risks? Do you already have some idea of what the story is?



Starting to fill in the campaign canvas.



Starting to fill in the campaign canvas.

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# Campaign Canvas

<b>Vision</b> What is your long term vision for what you want to achieve with this campaign? <b>1</b>	<b>How can we create that change?</b> How can we disrupt and transform the current system?  How can we create culture change on this issue? <b>3</b>	<b>Who can help?</b> Who do we need to bring about this change? Who has influence? Who is affected? And who can we collaborate with? <b>4</b>	<b>Goals</b> What is the specific goal for the project?  <b>Objectives</b> What do we need to bring this about? <b>6</b>	<b>What's the story?</b> What are the key elements of the new narrative we want to create? What will inspire key audiences and allies to act? <b>8</b>
<b>What needs to change?</b> Based on the problems we've identified that contribute to the current situation, what needs to change? <b>2</b>	<b>How can we disrupt or transform institutions?</b>  How can we support alternatives? <b>3</b>	<b>What influences?</b> What relationships, trend or events currently has influence/helps sustain the current situation or could shift it? <b>5</b>	<b>Outcomes</b> What does success look like? <b>9</b>	<b>What do people need to do?</b> How can key audiences and allies help bring about this change? What are our asks to them? <b>10</b>
<b>Assumptions</b> What assumptions have we made about how the system will respond? Why do we believe this plan will succeed? <b>11</b>	<b>Risks</b> Why might this plan fail? What resistance could we face? Are there risks to staff or the organisation? <b>12</b>	<b>Tracking &amp; measuring</b> What will we track and measure to show we are making progress towards our objectives? <b>13</b>		

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**NOTE:** Large templates to print the Campaign Canvas for your workshop can be found at the bottom of the page as well as at the end of the guide. You can also keep it and post it in your office so everyone can see it and update it as the plan changes. The orange boxes are the ones to keep an eye on and update as the external context changes, leading to needed shifts in what you've put in the grey boxes.

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## **Pg 101 Interview Worksheet**

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## **Pg 120 Insight Statements Worksheet**

[Download A4 Template](#)

[Download A1 Template](#)

## **Pg 124 Focus Questions Mash-Up Worksheet**

[Download A4 Template](#)

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## **Pg 125 Focus Questions Formula Worksheet**

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## **Pg 128 Campaign Canvas**

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The Mobilisation Lab exists to transform how campaigns are fought and won, providing a forward-looking space to envision, test, and roll out creative new means of inspiring larger networks of leaders and people around the world to create positive change.

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