In this section you will:

- **Learn** about the main considerations that will be involved in helping you to choose the most appropriate futures tool for your exercise
- **Use a diagnostic tool** related to the motivations and scope for your futures exercise to aid you in your selection

The selection of futures tools and methods appropriate for the context, objectives and resources of the futures exercise (see previous sections) is a crucial stage of a futures exercise. Designing and launching a futures exercise without careful selection of the appropriate futures tool and method will almost inevitably lead to a failure to achieve the required results, remove the appetite to use futures approaches on subsequent occasions and could even undermine the credibility of the lead bodies and committed stakeholders. There are therefore considerable risks and rewards at stake at this stage of the futures exercise.

This section therefore facilitates the identification of tools appropriate to the objectives and circumstances of the regional actors’ project. The approach includes a diagnostic element although the underpinning principle is facilitative and not prescriptive.

Most futures exercises use a mixture of methods to achieve their aims. In the FUTURREG toolkit approach, this mixed approach is advocated and the tools should be considered both individually and in parallel to ensure that they address the project aims from a number of different angles.

Although it is possible for regional development actors to use the toolkit independently, the use of experts is beneficial to ensure that the general principles contained within the toolkit are adapted to an optimum level for the local context and objectives of the specific exercise.

**Structure of the approach**

The facilitative approach consists of three levels:

1. **Typical motivations** - ‘classic’ examples based on the typical motivations underpinning the decision to use a futures approach. A cross-section of these is presented to represent the typical situations where futures tools can add value. (This list presented is not exhaustive, although regional actors should be able to identify examples that are comparable or equivalent to their own.)

2. **Generic variables** related to classic examples: this level will extract the variables that are relevant to the motivation and classic examples

3. **Outline of tools fit for purpose**: this level will identify tools that address the issues outlined under variables
STRUCTURE OF THE SELECTION APPROACH

Motivation and needs:

1. Generic variables/issues

Tools fit for purpose:

- Delphi
- Scenarios
- Visionary Mgt
- Horizon Scanning
- Trend Analysis
### ‘DIAGNOSTIC’ MATRIX OF MOTIVATIONS, VARIABLES AND TOOLS

<table>
<thead>
<tr>
<th>Motivations</th>
<th>Engaging stakeholders</th>
<th>Assessing key external influences/drivers for the organisation/region</th>
<th>Understanding current position and likely future path</th>
<th>Soliciting expert views</th>
<th>Networking and communication of key issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing a new strategy in the region</td>
<td>Scenario building Visionary management Futures workshop</td>
<td>Scenario building Trends analysis</td>
<td>Trends analysis</td>
<td>Delphi</td>
<td>Futures workshop</td>
</tr>
<tr>
<td>Understand the impact of external influences on the organisation</td>
<td>Delphi Futures workshop</td>
<td>Scenario building Futures workshop</td>
<td>Delphi Horizon scanning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help the region through a period of economic restructuring</td>
<td>Visionary management Scenario building</td>
<td>Scenario building Trends analysis</td>
<td>Delphi Expert panel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decide in which science and technology areas/sectors to invest</td>
<td>Scenario building Trends analysis</td>
<td>Scenario building Trends analysis</td>
<td>Delphi Multi Sector Qualitative Analysis</td>
<td></td>
<td>Scenario building</td>
</tr>
<tr>
<td>Generate widespread dialogue about the future of the region</td>
<td>Visionary management Scenario building</td>
<td>Trends analysis</td>
<td>Delphi Visionary management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Build organisational and regional capacity to deal with the future</td>
<td>Scenario building</td>
<td>Horizon scanning</td>
<td>Horizon scanning Delphi</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide anticipatory intelligence for actors in the region</td>
<td>Scenario building</td>
<td>Horizon scanning</td>
<td>Horizon scanning Trends analysis Delphi</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Challenge mindsets, shake off complacency</td>
<td>Scenario building Futures workshop</td>
<td>Trends analysis</td>
<td>Scenarios building Futures workshop</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Users of the toolkit may ‘navigate’ their way through the Diagnostic Matrix of Motivations, Variables and Tools to identify tools that are appropriate for their particular needs and exercise.

For example, for those actors interested in developing a new strategy for the region using a futures-based approach, engaging stakeholders might be undertaken through scenario building, visionary management and/or futures workshops. Assessing key external influences and drivers for the region could be achieved through scenario building and/or trend analysis.

The Diagnostic Matrix is designed to facilitate users in identifying tools that are appropriate for the objectives and purpose of their exercise. This should constitute a first step in establishing the detailed requirements of the exercise in terms of methodology, approaches and resources. The complexity and diversity of each exercises necessitates a second step - of more detailed analysis. Users will often be supported by experienced external agencies (e.g. consultants) in this process although the more detailed information on tools and case studies contained within this toolkit (and in the accompanying documentation) provides a basis for users to conduct their own analysis and research. Most regional development users are assumed to have multiple tasks to oversee simultaneously and may feel that, in the scope of the exercise, an expert intervention is more (cost) effective.

You should now:

- Understand the main motivations and issues involved in using futures tools
- Understand which tools are generally used for specific purposes (through a diagnostic process)
- Be ready to do more detailed analysis of individual futures tools.