

IDEA & INSIGHT FUNNEL

What: An idea & insight funnel action plan can help prioritise new ideas and insights coming from brainstorming and/or monitoring and evaluation of your projects. It helps you build knowledge to guide project or programme decisions.

Why: By applying this tool, you and your team can take a structured approach to learning by regularly funnelling which new ideas and/or insights from implementation experiences to prioritise and execute to improve project or programme design on an ongoing basis. At the end of the exercise, you will end up with a prioritised action plan to help your team to focus their efforts on the most valuable and feasible ideas or insights while not wasting resources on unproductive ones.

When: This tool is useful to apply early in the design phase of a new programme or project strategy. It could follow idea generation exercises, such as the [Crazy Eight tool](#) or the [Round Robin tool](#), to assess ideas against pre-identified needs and scope of your project. It is finally also a very useful tool to support monitoring efforts to prioritise which new insights to act on.

Step 1

PREPARE THE EXERCISE

Collect the ideas or monitoring and evaluation insights that you have already identified and want to use in this exercise.

When choosing the participants for this exercise, consider who the optimal participants would be to make prioritisation decisions. Also consider whether other colleagues or partners need to be consulted prior to conducting the exercise to ensure robust decision-making as well as support and approval of decisions made during the exercise.

Face-to-face: Prepare one large template printout or remake the template on flip charts as well as sticky notes for all participants.

Online: Before the session, encourage participants to familiarise themselves with the chosen online platform. If you use Miro, you can share [this short video tutorial](#) (3 min). Have plenty of virtual sticky notes ready for the participants to use. Prepare three breakout rooms ready for participants to work on the action plan. If connection allows, ask participants to do the exercise with their cameras turned on.

INFORMATION

PHASE
DESIGN

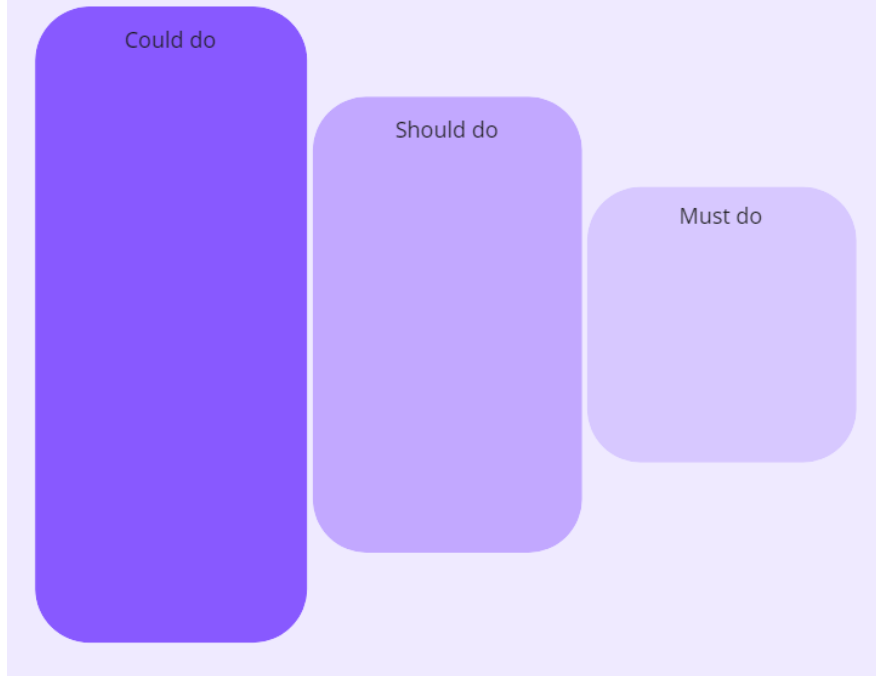
TIMEFRAME
60-120 MINS.

MODE
BOTH

PARTICIPANTS
4 - 8

FACILITATION LEVEL
BASIC

MATERIALS
A3 EXERCISE TEMPLATE OR
FLIP CHARTS, PENS, MAKERS
STICKY NOTES



The idea & insight funnel action plan

Facilitator tip

Feel free to edit the text boxes in the template to terms that are more familiar to your team, or more appropriate to your design phase. For example, 'Could do', 'Should do' and 'Must do' could be changed to 'Later', 'Soon' or 'Now'.

Before the exercise, familiarise yourself with the programme or project theory of change or logframe, relevant monitoring data and past evaluation, as well as relevant strategies to support and guide discussions. To help participants, print some of these out for easy reference and inputs for discussion.

Step 2

FILL OUT THE ACTION PLAN

Introduce the participants to the timeframe and the purpose of the exercise by going through the following:

- What are we going to do today?
- Why are they invited?
- What are their roles (if participants do not know each other well)?
- What is the timeframe?

Present the pre-chosen ideas/insights to the participants.

Before filling out the action plan, frame the exercise and remind participants of key project or programme documents, such as the theory of change, logframes, past evaluations, and key strategies relevant to chosen ideas/insights.

To fill out the action plan individually and silently:

- In addition to or building on top of pre-chosen ideas/insights, ask participants to note down as many new ideas and/or insights that can impactfully build or improve the given project on sticky notes. They can rely on their experiences, past brainstorming exercises, 'water cooler conversations', or inspirations from

a conference. There are no limits, as long as it resonates with project ambitions and the identified needs. Do not worry about prioritising for this first step. The main goal is to identify as many relevant ideas and/or insights as possible that can benefit the project (Allow 5–10 minutes).

- Put an expiration date on each idea/ insight for your action plan to stay relevant and timely. They can use these questions as guides: What are the benefits or challenges of acting on the idea/insight now, rather than waiting (e.g., in terms of available resources, access, or a unique opportunity only now)? Is there something in the context or the necessary partnerships that affects the timing? Is there momentum now that is not expected later? (Allow 5–10 minutes)
- Using sticky notes, place their ideas/insights onto the action plan according to where they find it most appropriate. Tell the participants not to overthink this – they will have time to adjust and discuss with their co-participants further on in the exercise (Allow 5–10 minutes).

After this silent and individual work, split the participants into three groups, one for each column, to prioritise the ideas and/or insights:

- Have the groups consolidate the inputs in each their designated column by removing duplicates and merging similar ones. Each group should end up with a column providing clear, action-oriented ideas and/or insights. (Allow 10 minutes).
- Ask one person from each group to present the consolidated ideas and/or insights to all. The groups not presenting provides feedback and the ideas and/or insights are updated as necessary. (Allow 10 minutes).
- Have the group discuss and prioritise your “Must Do” tasks, moving from “Could Do,” “Should Do,” to “Must Do.” together. (Allow 15–20 minutes).

Now you have a finalised idea & insight funnel action plan!

Allow approximately 50–60 minutes for this step in total.

Facilitator tip:

When making the final decisions on where to place the ideas/insights, encourage discussion among participants and probe to scrutinise the rationale for the chosen placing of the ideas/insights. Keep an eye on group dynamics and power balances to get a sense of the overall agreement of how ideas are placed. Support that decisions are made based on good arguments, data, and evidence.

Remind participants to apply a protection, gender, and inclusion lens when noting, discussing, and prioritising the ideas/insights.

Remind participants to consider the key project or programme documents to stay within scope of strategic intent and key ambitions, resources at hand, internal and external priorities, operational plans etc.

Step 3

WRAP UP AND NEXT STEPS

With the action plan now in place, it is time to decide on next steps. Agree with the participants how the ideas/insights prioritised as “must do” should be moved to your project planning document and into concrete upcoming implementation plans. Decide together who should do what and when.

Next steps

Keep the idea & insight funnel action plan on the wall in your office space where you normally have your project team meetings. It keeps your team priorities aligned in a shared and tangible place. Revisit and update the action plan regularly at project team meetings to manage new incoming ideas and insights as well as to monitor efforts. This will help you structure learning and to prioritise which new ideas and acquired insights to act on.

If an idea/insight is not prioritised within the set expiration date during the exercise, it should disappear from your list over ideas to keep over time.

Allow approximately 15–20 minutes for this step.