



Scaling Toolkit

a guide to scaling (digital) innovation in international cooperation

digital.
global

You have questions or feedback? Get in touch with us!

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scaling digital solutions

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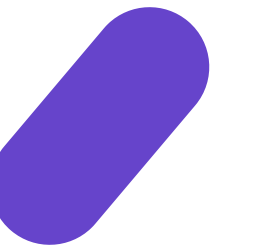
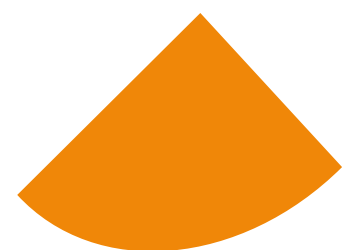


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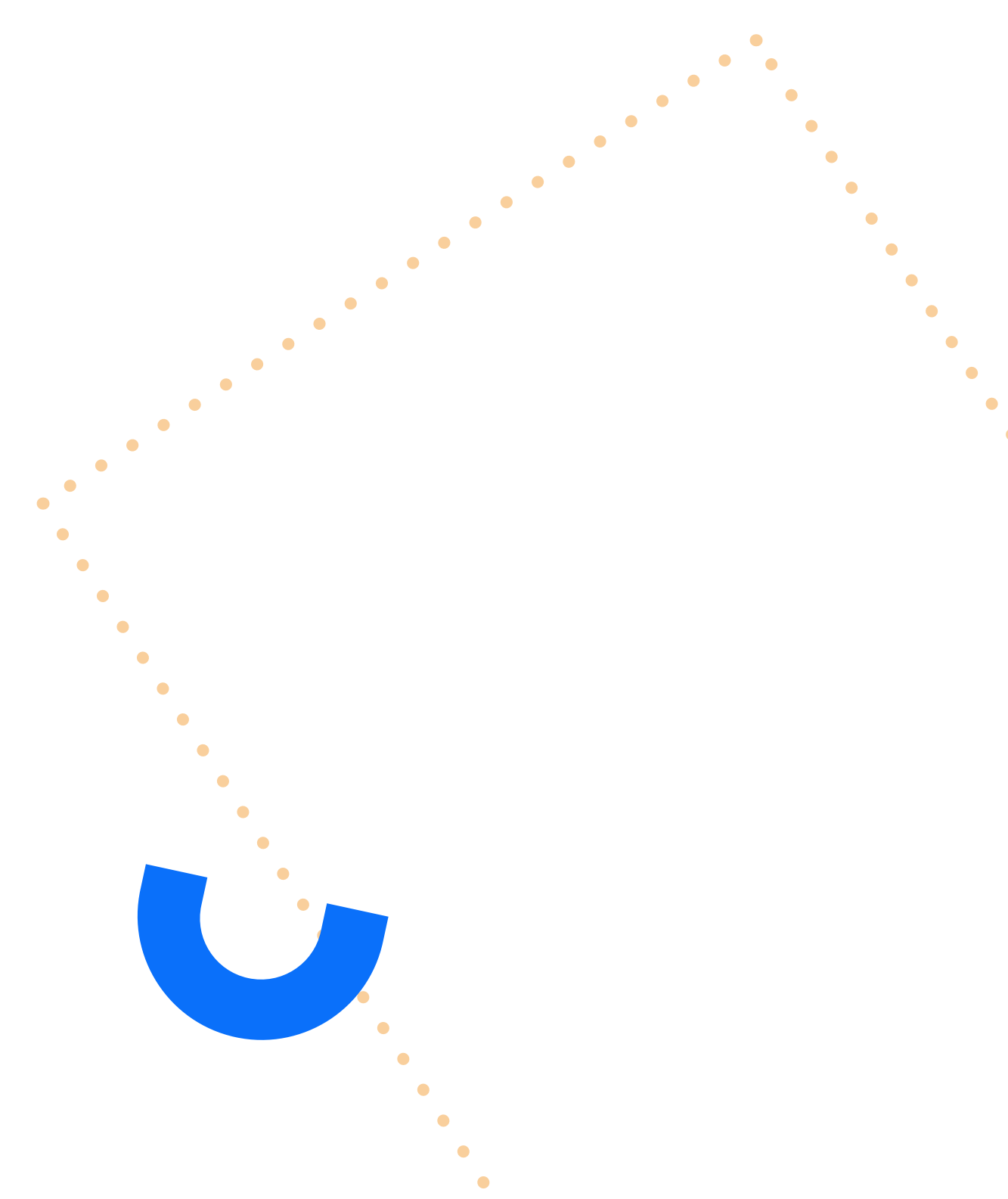
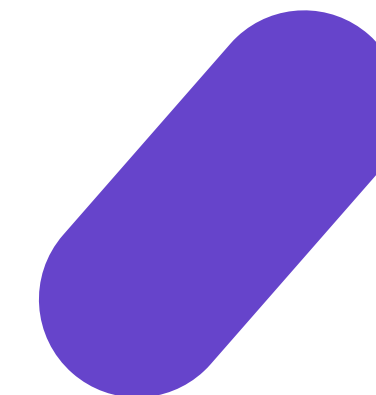
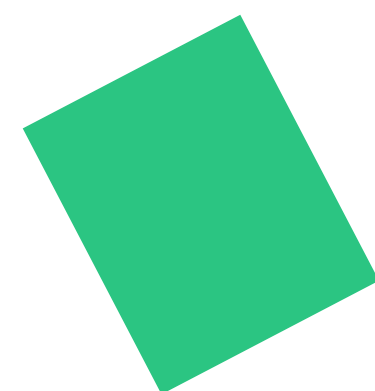
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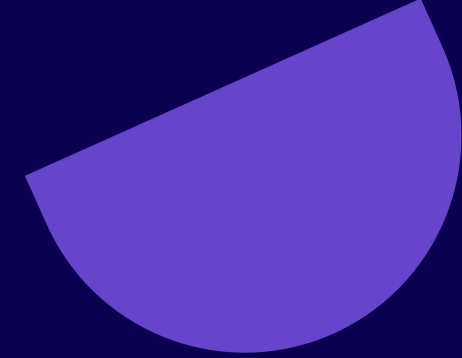
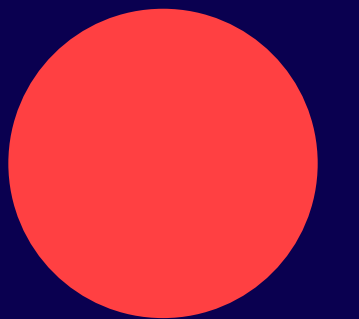
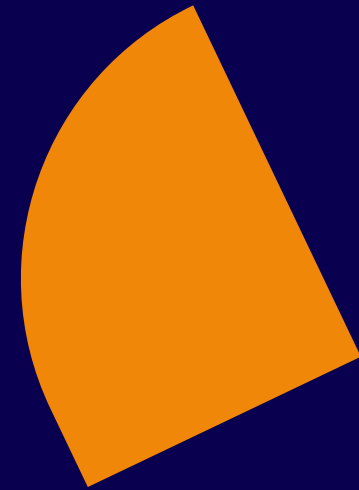
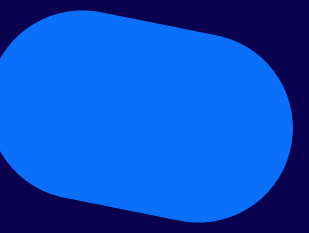
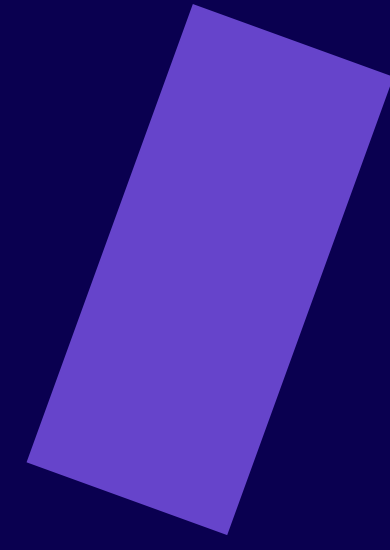
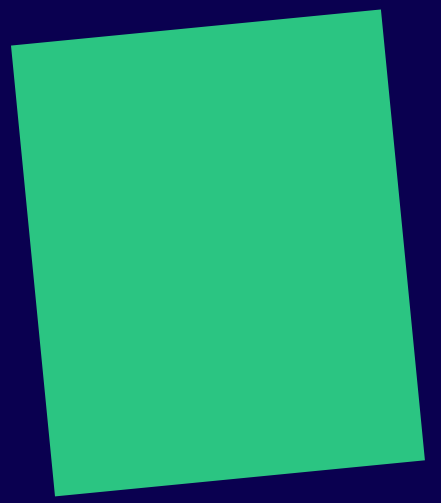
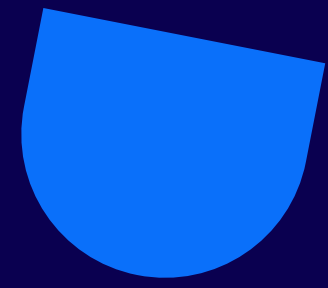
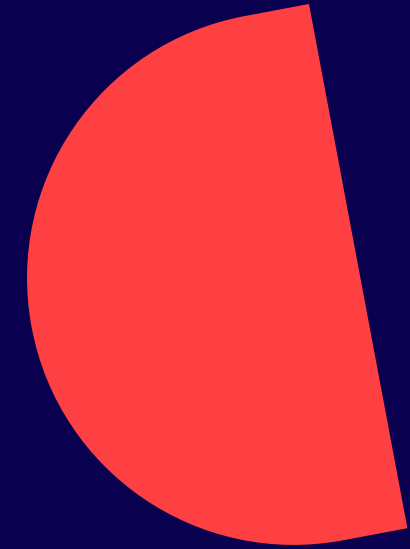
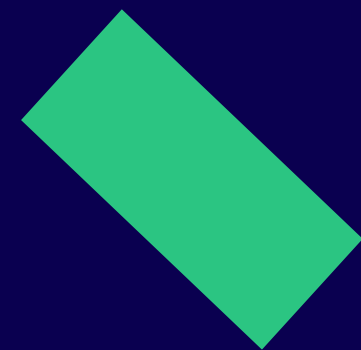
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01

Introduction to the toolkit





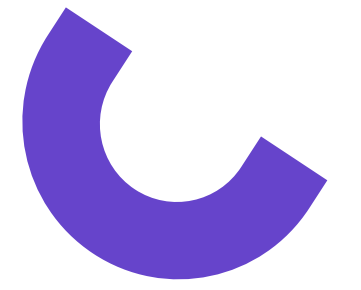
Scaling impact in international cooperation

The potential of digital innovation to drive im- pact in international cooperation.

“Digital technology is shaping history. But there is also the sense that it is running away with us. Where will it take us? The answers to these questions depend on our ability to work together across disciplines and actors, across nations and political divides.”

- UN Secretary General, Antonio Guterres

Digital technology is a fundamental force for change in this century, reshaping economies, government, and civil society – thereby impacting almost every aspect of our lives. Many actors and organisations in international cooperation have recognized the potential of digital technologies and innovations to respond more effectively to development challenges. Much hope is placed on the scalable character of digital solutions, enabling them to reach larger numbers of people and increase the impact of these solutions, with an expectation of reduced needed investments or human resources. For businesses and large organisations alike, the scalable character of digital solutions holds the promise of developing standardised software products and services. After local adaptation, they can be introduced in a larger number of different target contexts with a much faster adaptation rate than analogue or hardware products.



“Innovation per se does not create impact. (...) Focused and committed scaling—delivering effective products and services to more people and doing it more reliably, more efficiently, and with a steady improvement in quality—is what creates impact.”

- Christian Seelos and Johanna Maier

Many solutions face the danger of not transcending the pilot stage and not reaching the full potential of their impact. This is especially the case in environments where financial, personnel, and infrastructure resources are scarce. Therefore, it is critical to consider sustainability and scale as early as possible in the process. In addition, culture and changing political priorities still favour the development of new solutions. This leads to resources being invested to reinvent the wheel where existing solutions with proven impact may be adapted to new contexts instead. Especially in the local structures of donors and implementing organisations (local programs or country offices), the incentives for scaling proven solutions from external or internal solution providers tend to be low. There is also evidence that many funding mechanisms and procurement processes do not accommodate the iterative development processes required to scale impact. Equally important are demand- and user-centred processes. They help ensure that solutions are aligned with local demand, user needs, local structures, resources, and priorities to enable successful scaling of impact.

The definition of scaling impact

There are various definitions of scaling. Moreover, depending on the vantage point, one stakeholder sees scaling where another emphasises that impact is being created by adapting and contextualising an existing solution. While the terminology differs, most definitions share a common objective and a similar rationale. In summary, scaling in international cooperation harnesses the potential of existing solutions to achieve broader positive impact, ideally systemic impact, for people and/or the environment. The impacts achieved through scaling should be guided by the intention to achieve optimal - not maximum - scale. Scaling impact almost always includes trade-offs that need to be balanced to achieve¹ optimal scale. The search for optimal scale can be described along the different dimensions of broad impact²:

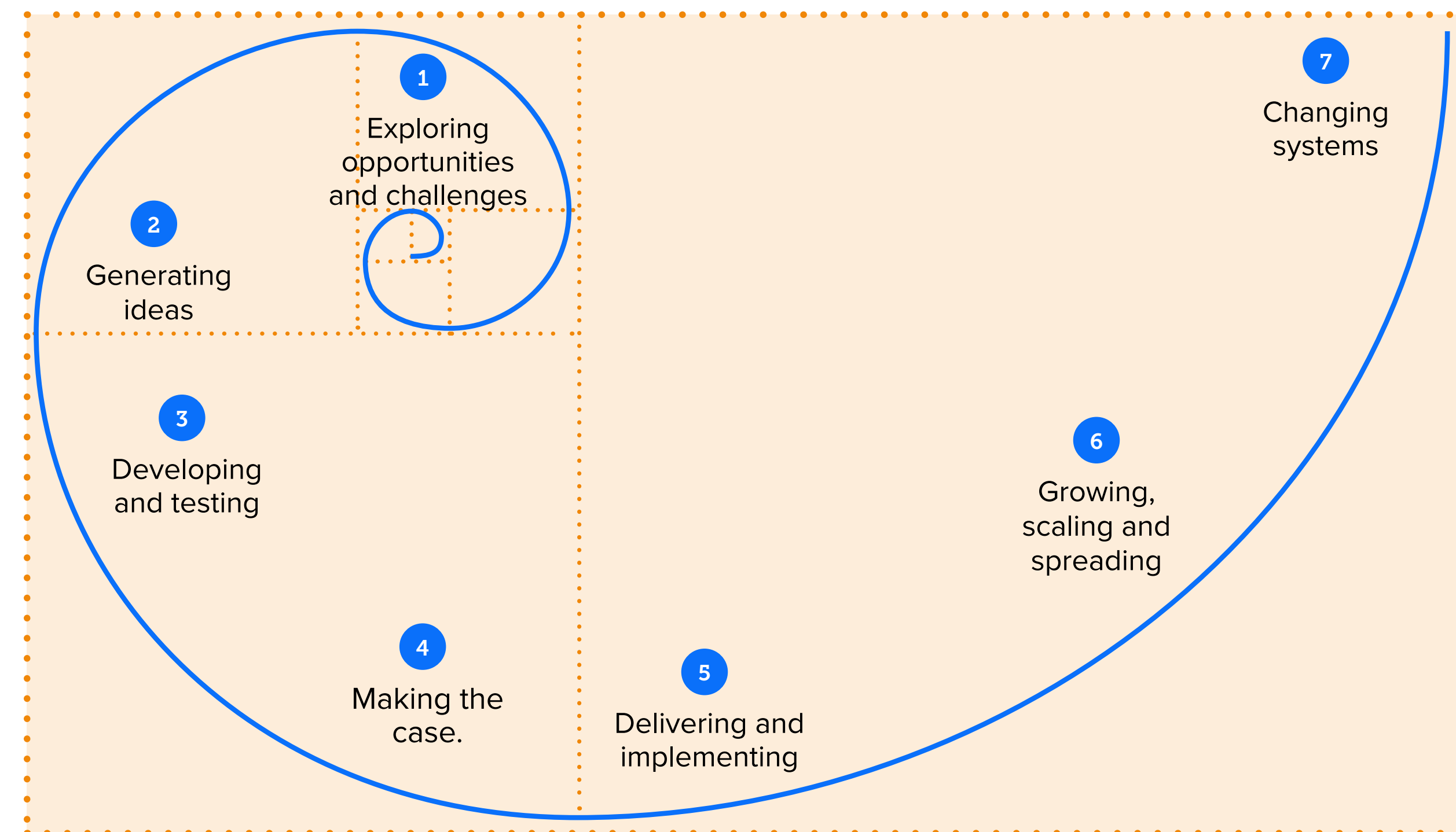
- **relevance:** the impact addresses the needs of people and/or planet.
- **sustainability:** the impact is durable and reliable over time
- **quality:** the impact involves qualitative changes for people and/or planet
- **quantity:** the impact represents quantifiable benefits for people and planet

In order to describe how scaling unfolds towards broad impact, it proved helpful to differentiate between various pathways of scaling. These pathways may be distinguished for clarity, however, they are not fully comprehensive and usually overlap in reality:

- **Scaling vertically / scaling up:** changing the institutional environment to achieve greater impact
- **Scaling horizontally / scaling out:** expanding impact through replication and adoption in large geographies and populations
- **Scaling functionally:** expanding/adopting the functional scope of an innovation for greater impact
- **Scaling deep:** increasing impact of solutions by changing relationships, cultural values and beliefs, hearts and minds

Understanding in which stage an innovation is, helps identify what kind of support is needed to pave the way for scaling impact. Building on a consistent and widely understood framework that defines the different maturity stages of innovations proves valuable. The social innovation spiral³ provides this helpful orientation to define scaling.

The decision to scale an innovation means that an innovation has demonstrated success and impact, at least at a small scale, is provided by a skilled team and has attracted partners to support it. Scaling is the process of ad-



1 Robert McLean, John Gargani: Scaling Impact – Innovation for the public good (2019)

2 Ein Wegweiser. Scaling-up für globale Vorhaben

3 Murray, Caulier-Grice, and Mulgan: NESTA 2014)

opting this innovation across large geographies and populations to achieve transformational impact. The toolkit presented here focuses on the step described in the social innovation spiral as „growing, scaling and spreading“.

The approach of scaling impact, as defined in this toolkit, is best described as transferring a proven solution to a new context. The context may be a new geographic context, an expanded or new target group or even a new functional scope or thematic context. The adaptation required to make a proven solution work in a new context can range from the adaptation of components of the solution to the establishment of contextual preconditions that enable the integration of the solution. Care should be taken to ensure a good balance between the adaptations of the solution and the context, as the establishment of appropriate preconditions is often more complex and time-consuming than the adaptation of the digital solution.

Scaling impact in the context of digitalisation

Nowadays most solutions or innovations in international cooperation already include digital components or solutions. Current societal developments and the strategic orientation of international cooperation organisations indicate that digitalisation will become even more important in the future. Therefore, scaling impact should also take into account the specificities and characteristics of digital solutions.

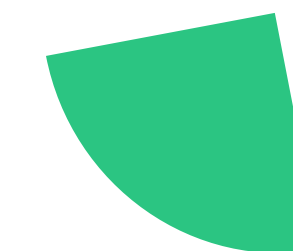
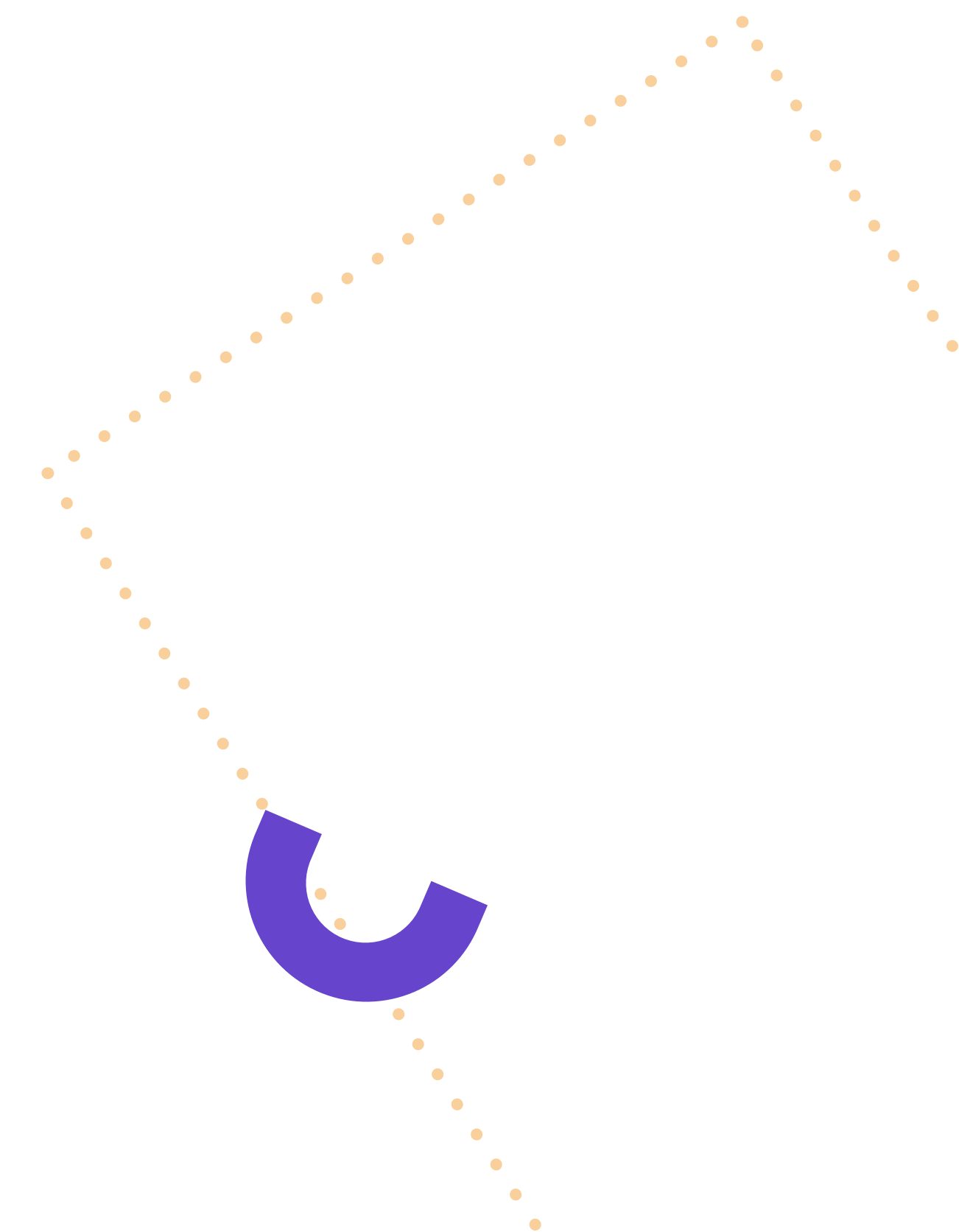
The degree of digitalisation of solutions can vary widely, ranging from services using digital components to tech-

nical software solutions, AI models, standards and more. Depending on the solution and context, digital components play different roles in scaling digital solutions. It may be that the focus of scaling is on adapting a digital application. For example, in the case of Clurb, a digital platform for disaster risk management, scaling the digital solution was focused on adapting the digital platform and features to local needs and integrating the platform with the existing technical infrastructure. It is also possible that the digital components of the solution play a subordinate role and that the core components of the solution that are relevant for scaling are more at the level of the business model or partner networks. A good example for this was the scaling process of Rural Women Entrepreneurs. The solution is based on Women Business Centres where female entrepreneurs provide locally designed advisory services to their communities around health, nutrition, and agriculture. When the project scaled to other countries, interestingly, the components around how to build women business centres and co-designing local services were the aspects that were scaled. The digital component, i.e. the app enabling female entrepreneurs to provide their services were newly developed by local partners to match the use cases in the new target contexts.

The ease with which digital innovations can be technically duplicated tempts us into the misconception that scaling a digital solution into another context is merely a copy-paste task. However, digital solutions, like any other solutions, need to be adapted to local circumstances (such as existing solutions, infrastructures, and needs) to be effective. These adaptations can often be implemented more quickly with digital solutions and require fewer resources. When assessing the scalability of digital solutions, one should consider specific factors such as technical inter-

operability, hardware or infrastructure requirements, and the skills needed to operate the solution. Furthermore, digital innovations entail specific technical risks that must be taken into account before and during scaling. Thus, technical specifics, requirements, and risks of digital solutions should carefully be considered before and during the scaling process.

However, digital innovation also opens up entirely new ways of scaling and broadening impact efficiently. Through open source approaches (such as Digital Public Goods), software solutions can be made generally accessible and thus be used by many actors. In this way, the solution can scale by being adapted to new contexts and use cases in parallel.





Overview: toolkit for scaling (digital) innovation in international cooperation

Purpose and added value of the toolkit

The scaling toolkit focuses on scaling the impact of digital innovation, with a broad definition of digital innovation ranging from solutions with a digital component to full-fledged digital solutions.

The toolkit provides guidance and support for practitioners on how to scale successful digital innovations by integrating them locally, regionally or globally in international cooperation (GIZ and non-GIZ). By doing so, it aims to leverage digital solutions in order to drive relevant, high-quality and sustainable impact at scale. To emphasise this focus on broad impact, the term „scaling impact“ is used throughout the toolkit.

The knowledge, examples and tools compiled in the toolkit originate from practical experience with a focus on scaling digital innovations within GIZ programs. It serves as an easy-to-use, open, modular and actionable source of knowledge providing guidance through an iterative multi-actor process.

The target group of the toolkit includes actors that play a significant role in the process of scaling impact. It includes the teams who own the digital innovation to be scaled (solution provider), the staff in the local cooperation programs (impact owner) in which the digital innovation is being integrated, the intermediaries promoting and facilitating the scaling processes (facilitator) as well as other important

actors that support the scaling at different points of the process (enabler). All these actors may or may not belong to GIZ or other development agencies and donor organisations.

From all these target groups, the toolkit is particularly intended for the direct use by the facilitator. It provides them with support to tailor the scaling process iteratively to evolving requirements and to the needs by all other actors involved.

As there are already many good initiatives and toolkits for scaling impact in international cooperation, this toolkit builds on the existing knowledge, approaches, and methodologies and applies them explicitly to the context of scaling (digital) innovations in the broader context of GIZ.

How to use the toolkit

Guiding principles

The process of scaling impact is complex, lengthy and requires the involvement of a broad variety of stakeholders and their buy-in, capacities and infrastructures. Certain principles have proven to be helpful in making such a process navigable and form a basis for this toolkit:



People and planet at the heart

Beneficiaries, the people affected by the solution, are at the centre of the scaling process. Their perspectives must be constantly taken into account throughout the process. This is important not only because the solution will only be effective if it sol-



Optimal scale

Scaling impact almost always involves trade-offs that need to be considered in order to achieve impact. It can happen that the negative effects of a solution are amplified by scaling and thus counteract the intended impact. Therefore, scaling should not follow the principle of „bigger is better“ but should be guided by the intention of achieving optimal - and not maximum - scale.



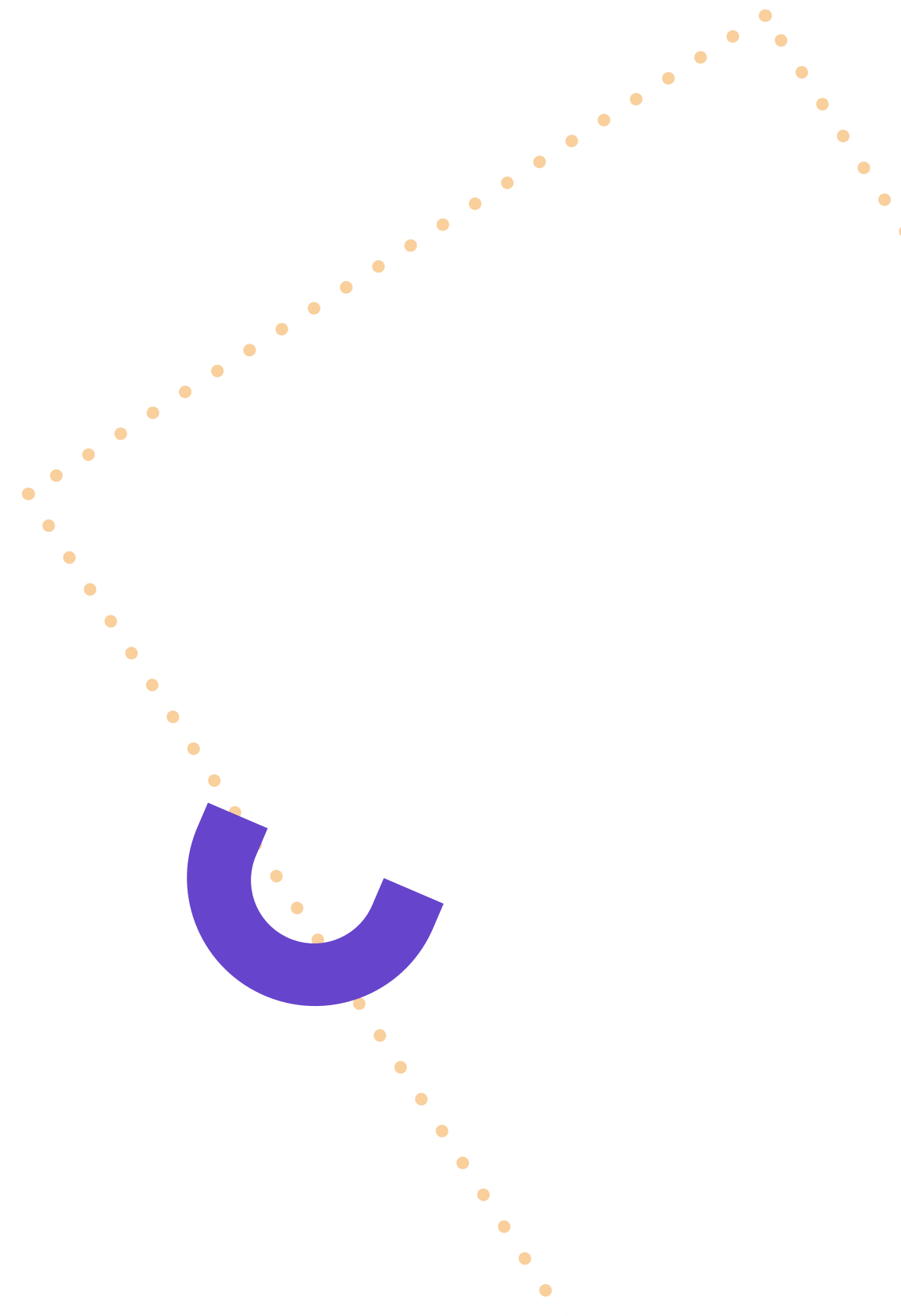
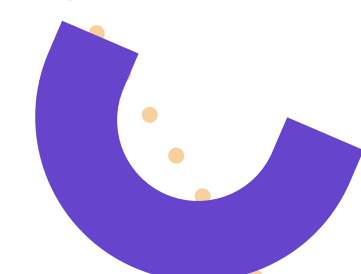
Iterative development

An open-ended process consisting of learning loops in which the scaling process is constantly adapted can make the complexity of impact scaling navigable. This way, methods, approaches or the strategy can be adapted quickly, while the effort required to do so is still relatively low. Such an approach can lead to minimising risks and generating solutions that are relevant to users and achieve the intended impact.



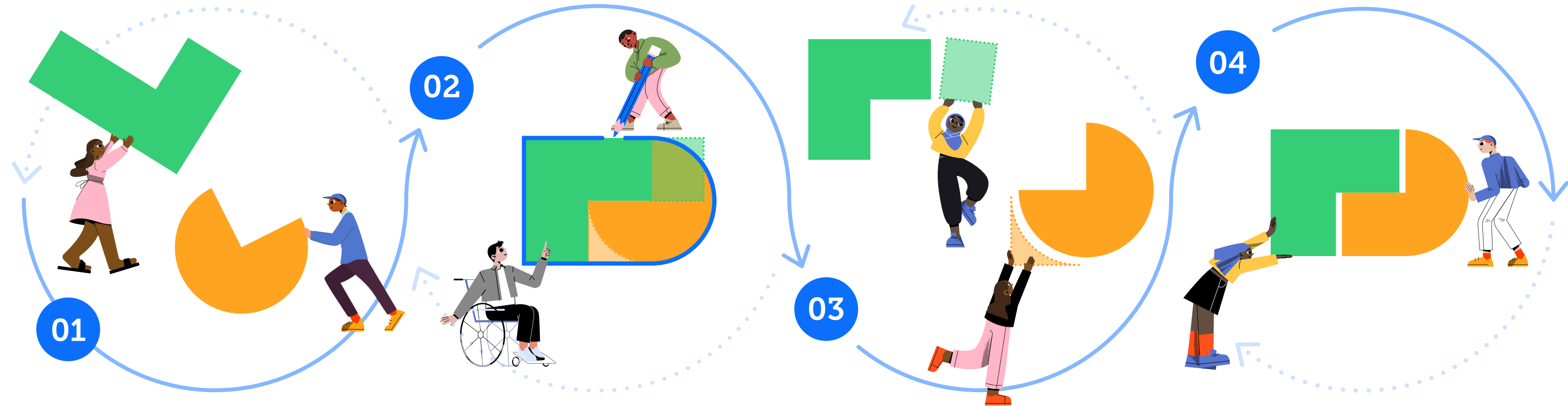
Continuous participation

Scaling is a collaborative process involving a variety of stakeholders who are constantly changing throughout the process. Continuous ownership that takes into account people's interests, expectations and resources is a key aspect of scaling impact and needs space for conversation and co-creation.



Phases and steps

The toolkit is based on a simple framework. The four phases „Match solution and demand“, „Develop scaling strategy“, „Establish pre-conditions for scaling“, „Implement scaling“ with their respective sub-steps serve as a schematic model that enables clear orientation in the scaling process. The phases and the subordinate steps are not to be understood as a linear process but as iterative loops. It will often be necessary to refer to previous process steps. For example, it may be that in the process of developing a scaling strategy you realise that the identified solution does not fit the selected context optimally and you must look for alternatives again. Or during the establishment of pre-conditions, it may be discovered that the developed scaling strategy needs to be adapted. The scaling of impact should be thought of as an open process of continuous learning loops in which the scaling process is constantly adapted.



01 | Match Demand and Solution

Explore demand

Explore local problems and demand for digital innovations

Identify solutions

Identify digital solutions for given problems and demand

Match solution and demand

Assess and match best fitting digital solutions with local problems and demands

02 | Develop Scaling Strategy

Envision Scale

Define a shared vision of the impact to be achieved by scaling and establish a core team

Understand Solution

Understand the digital solution and how impact is generated under which contextual requirements

Understand target context

Understand the local target ecosystem, problems and needs of beneficiaries

Co-create scaling strategy

Define adaptations of the digital solution to create impact in the target context and develop a strategy for implementation

03 | Establish Preconditions for Scaling

Establish Team and Leadership

Define a team and leadership capable of driving scale with long-term commitment

Activate Partner-Network

Further develop the scaling strategy with internal and external partners required for efficient scaling to include them in the scaling process

Legitimize change

Advocate for change at the political level in partner countries

04 | Implement Scaling

Build and Strengthen Capacities

Build resources and organizational capacity for scaling at team and partner side.

Learn and adapt

Implement first pilot, measure progress and impact in regular feedback loops and continuously adapt and grow the solution based on learnings and evidence.

Roles

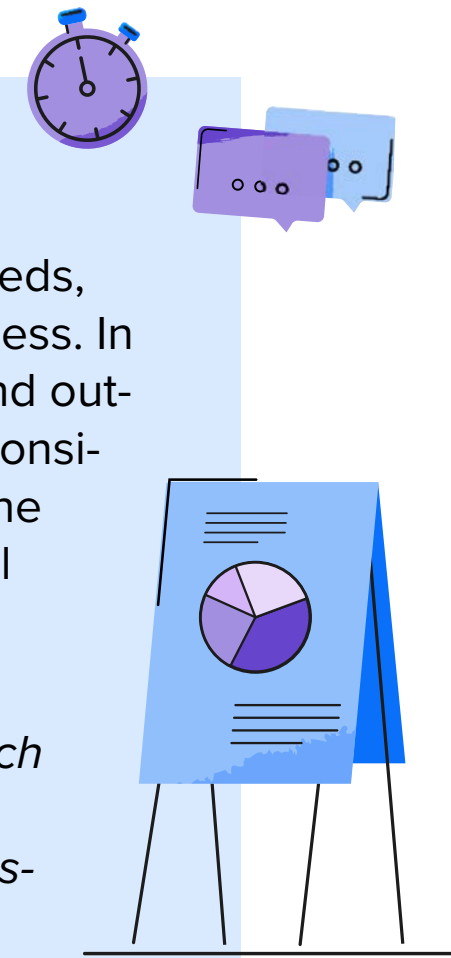
Discussing and assigning the four roles (facilitator, solution provider, impact owner and enabler) helps to define the tasks and responsibilities of all actors so as to optimally support and co-own the process of scaling impact. In most cases, each role will be taken on by multiple people, in parallel or shifting over time. It can also happen that one person takes on different roles at the same time.

Furthermore, the roles are to be understood as a flexible model that can be adapted to the circumstances of the scaling endeavour. It can make sense to differentiate the model in certain scaling processes and to add further roles. It is also possible that in some contexts the role titles and descriptions lead to misunderstandings and should rather be adapted.

Facilitator

The facilitator closely monitors changing needs, constraints and enablers of the scaling process. In their role, they remain impartial to parties and outcome-agnostic. However, they assume responsibility for gathering the right voices around the table and for enabling alignment and mutual support between all roles in the process.

For example, this role can be held by a coach of a local or central innovation program or fund that aims to promote the scaling of existing solutions.



Impact Owner

Impact owners help to shape the scaling process by constantly challenging the digital innovation with regards to its sustainable impact and relevance for the local context and beneficiaries. Ideally, this role is taken on by someone who represents or belongs to the target group of beneficiaries. Moreover, impact owners support and enable the scaling process within their capacities, e.g. by providing all relevant information for the solution to be contextualised and by activating their partner network.

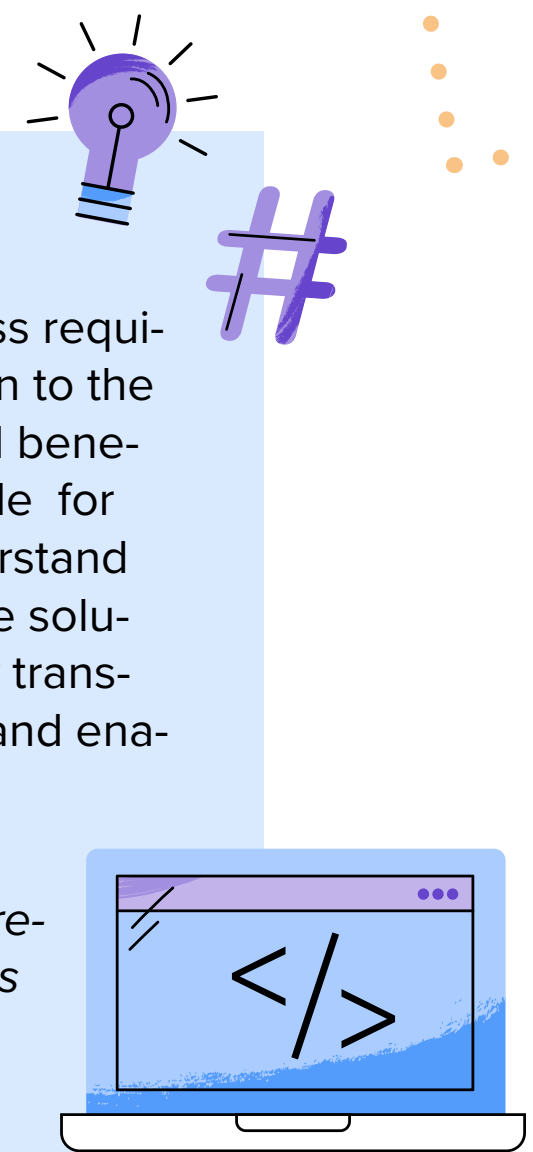
For example, this role can be held by a project manager of a local program of a country office who is looking for a solution to solve a problem and create a positive impact.



Solution Provider

Bringing a solution into the scaling process requires listening and learning to fit the solution to the needs of the impact owners and their end beneficiaries. Solution providers are responsible for pulling the information they need to understand the target context and to contextualise the solution together with the impact owner. They transparently communicate which constraints and enablers they require support for.

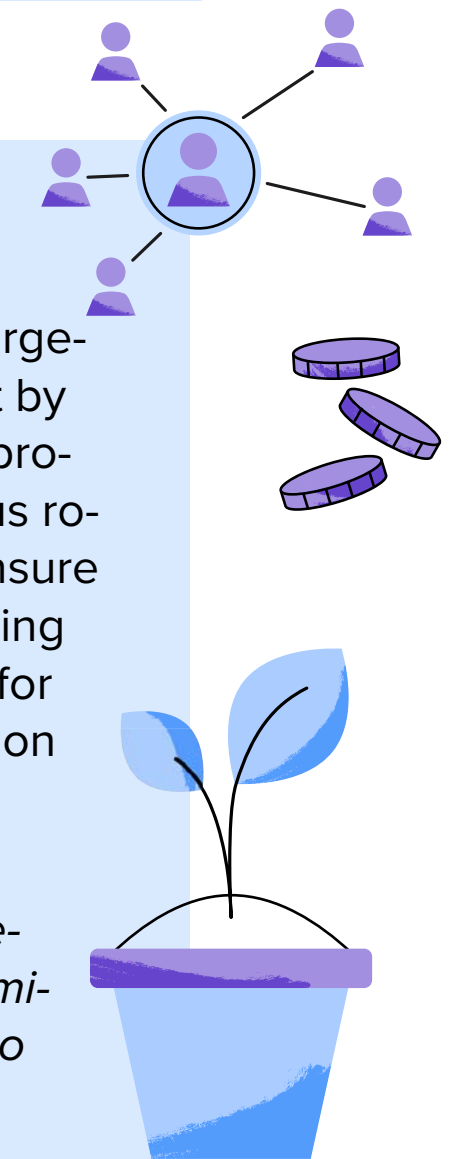
For example, this role can be held by representatives of a social business or previous partner project who want to scale the impact of their solution.



Enabler

The success of a scaling process depends largely on the co-ownership and enabling support by all stakeholders involved. Being an iterative process, the needs and necessities of the various roles will change over time. Enablers overall ensure that they use their capacities, networks, funding instruments, and advocacy as a true partner for the problem/challenge owners and the solution providers.

For example, this role can be held by a representative of a donor organisation or a local ministry who has an interest in scaling impact to reach broader positive impact.



Keys to success

The keys to success provide helpful tips and guidance to be considered in the scaling process. They point out common barriers and hurdles and help to adopt different perspectives and mindsets. The Keys to Success presented here are initially kept general. In the toolkit, they are specifically adapted to the corresponding phases and thus provide important support in the respective situations of the scaling process.

#1

Co-design for co-ownership

Co-design and iterate the scaling process in such a way that all involved parties continuously perceive mutual benefits and are committed to invest their time.

#2

Embrace complexity

Harness local knowledge and perspectives to appreciate the complexity of the local context and the problem at hand.

#3

Talk about scaling

Foster learning and cross-pollination with stakeholders, experts, and decision-makers by sharing why, what and how you set out to scale your solution in the new context.

#4

Sustainable impact

Aim for sustainable and relevant impact beyond project cycles by favouring lasting capacities and ownership in the local ecosystem.

#5

Keep it iterative

Solution and context will unfold optimal impact over time when you keep iterating and continuously learning from helpful metrics and test-learn-loops. Keeping it iterative may lead your team to anything from making minor adaptations to better reach your target group or to a major pivoting of your value proposition.

#6

Balance interests

While matching donor priorities may ensure crucial access to funding, pivoting towards local needs and demand is key to generate ownership and impact where it matters most.

#7

Establish clear leadership

Clear roles and facilitative leadership in the core team help you stay on track and allow for ongoing self-reflection around needs in the team, aligned incentives, and co-ownership.

#8

Go for diversity

Inviting diverse cultural backgrounds, genders, disciplines, and perspectives in the core team benefits holistic and robust thinking and doing toward optimal impact.

#9

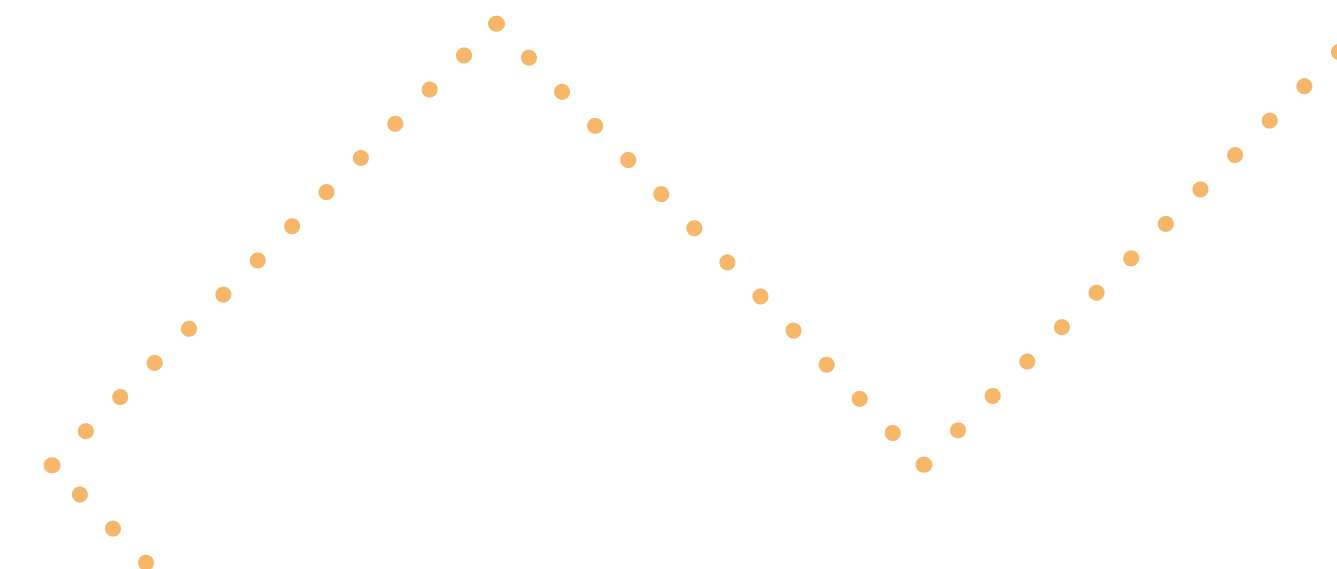
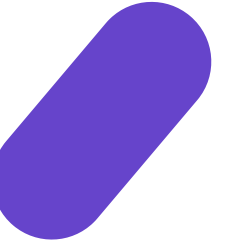
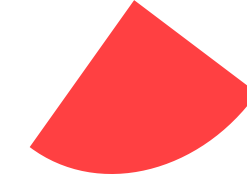
Fully invite partners

When partners share your scaling vision and see real benefits for their own goals, they are more likely to tap into their strengths and networks to help you generate impact. Partners' perspectives and their proximity to your target group can enable you to deliver relevant and sustainable impact.

#10

Learn from opposition

Any reservations or resistance your scaling vision may provoke in stakeholders may be an opportunity to iterate your solution toward co-ownership or to ensure sustainable impact through the right advocacy angle.



02

Toolkit for scaling (digital) innovation in international cooperation



Phase 01

Match Demand and Solution

Let's form a promising, informed match between
scalable solution and local demand.



Phase 01: Match Demand and Solution

Overview



Explore demand

- Reach out and explore
- Assess demand

After this step, we will have assessed demand for digital innovations, including

- first insights about the context and the underlying problem
- an understanding of the impact potential
- a preliminary alignment with funding criteria.

Identify solutions

- Reach out and scout
- Assess solutions

After this step, we will have assessed digital solutions, including

- information on their scalability
- evidence on impact and cost.

Match solution and demand

- Compare solutions
- Opt for best fitting solution

After this step, we will have an informed match between a solution and a given demand, including

- evidence backing our comparison of various solutions, demands, and context
- co-ownership of the decision by key stakeholders and all support for the process to come.

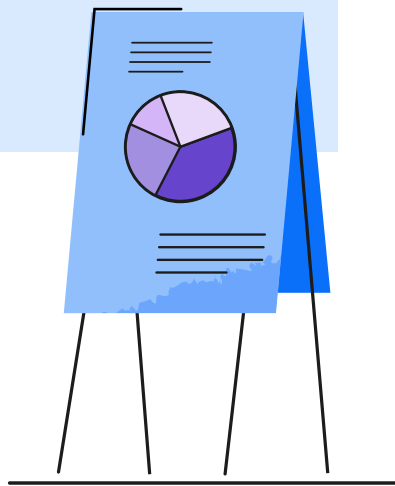
Phase 01: Match Demand and Solution

Roles



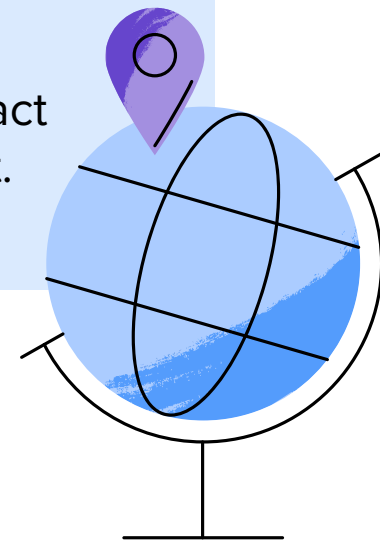
Facilitator

The facilitator will help ensure that all parties are able to openly share their perspectives on the potential solution(s) and target context(s). Keeping an eye on concerns, needs, and surfacing expectations will foster a trusted environment for later collaboration and efficient decision-making before opting in or out of a joint scaling process.



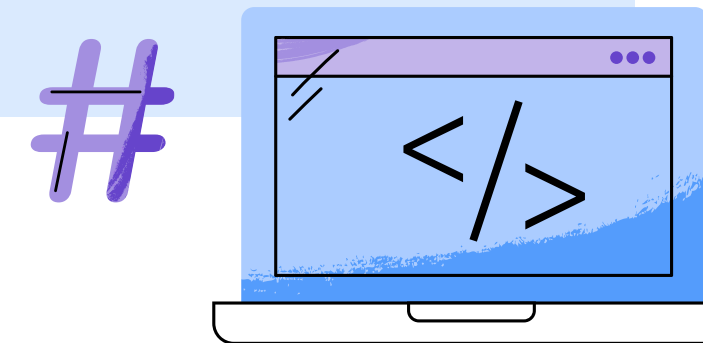

Impact Owner

The Impact owner(s) represented by a GIZ country office, local structures, or other local stakeholders will help clarify the local needs and core problems which may benefit from a digital solution. Their perspective on what is needed and what kinds of solutions may be absorbed by the local context will guide the decision for or against a scaling process. They ideally pull any information which they require to make this decision, jointly with the other parties. Generally, their voice is key to ensuring that any later scaling will truly be working to generate relevant and sustainable impact at scale for this target context.



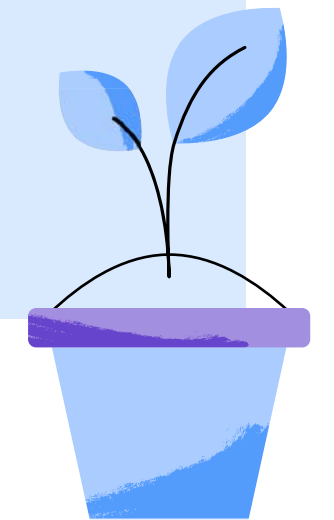

Solution Provider

The Solution Provider will bring one or various previously implemented digital solutions to the table. They own and provide valuable knowledge, especially around the proven impact of their solution as well as the concrete requirements for their solution to generate relevant and sustainable impact at scale in new target contexts. They shall pull any required information to efficiently assess whether their solution may generate the desired impact in the new target context.




Enabler

Enablers such as donors or GIZ regional departments will support an efficient flow of information and contribute to connecting and onboarding all actors involved in this phase. As later ownership and commitment will largely depend on funding, they should ensure a clear outlook and provide (initial) funding wherever possible.



Phase 01: Match Demand and Solution

Keys to success

#1 Co-design for co-ownership

Being transparent and candid with each other from the very start helps build trust and set up a co-owned process that serves everyone involved.

#2 Embrace complexity

When assessing the local demand, tapping into local knowledge and perspectives will help ground the discussions based on the realities of the target group(s). This helps appreciate the complexity of the local context and the problem at hand.

#3 Talk about scaling

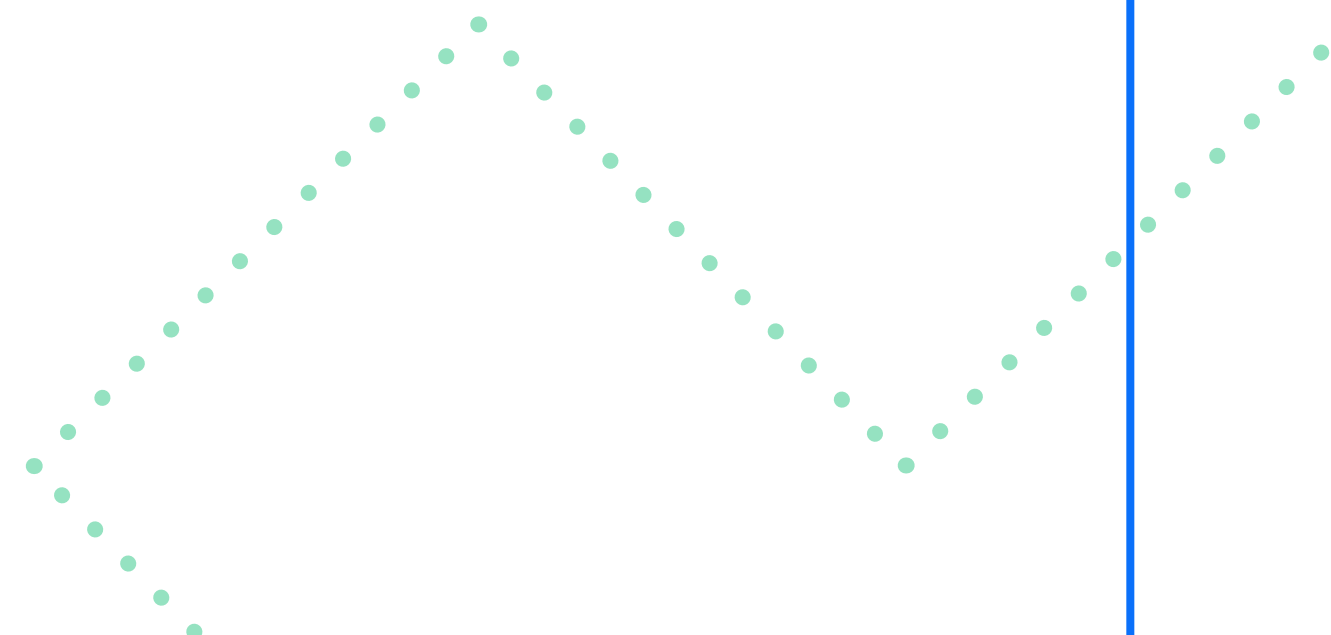
Foster learning and cross-pollination with stakeholders, experts, and decision-makers by sharing why, what and how you set out to scale your solution in the new context. Looking for allies and inviting diverging perspectives from the start provides a helpful reality check for the scaling process.

#4 Sustainable impact

When assessing solutions and context for the joint scaling process, try to aim for sustainable and relevant impact beyond project cycles, rather than short-term solutions for acute problems.

#6 Balance interests

When assessing and deciding on a match of solution and context, potential trade-offs between diverse perspectives may require some balancing. Accommodating donor priorities may ensure access to funding. However, emphasising local needs and demand is crucial to generate impact where it matters most.



Phase 01: Match Demand and Solution



Steps

Explore demand

Reach-out and explore

Identifying demand for digital innovations benefits from clear search criteria and preparation of the outreach to local actors such as country offices. The [tool Local Demand Check](#) provides a selection of helpful criteria which may serve as a conversation starter with a focus on target groups, core problems and desired impact. Providing an example overview of a scaling process such as in the [tool Team Collaboration Canvas](#) may help clarify the intention of your outreach from the start. Moreover, identifying demand for digital innovation benefits from ongoing conversation and relationships. Expert gatherings with leadership and program staff from the country and regional levels offer great opportunities for that.

Assess Demand

Inviting potential [impact owners](#) to provide information in the [tool Local Demand Check](#) will enable transparent assessments and, later in the scaling process, feed into the [tool Scaling Vision](#). Involving various types of actors in the discussion supports the diversity of perspectives. This helps ensure that decisions are based on considerations around the impact and feasibility of a demand case, while donor interests inform the process without skewing it.

Identify solutions

Reach-out and identify solutions

Before reaching out it is crucial to clarify which criteria will guide your quest for scalable solutions. The [tool Solution Scalability Check](#) provides a means to start the conversation and obtain helpful information from potential solution providers. Approaching solution providers may also benefit from transparently sharing some background information about your intention and an example overview of a scaling process such as in the [tool Team Collaboration Canvas](#). Your outreach activities can be sped up by tapping into existing platforms and databases compiling tested digital solutions. The outreach should be organised in a lean way for everyone involved. This can include a desk-based search and a first round of interviews to gather relevant information from and provide clarity to the [Solution Providers](#).

Examples

Staying in touch with innovation

When identifying digital innovations from within the GIZ portfolio, a range of databases and platforms can prove very useful, including GIZ: DIGINAWI, Digital Pathfinder, and Tech Detector. In order to identify external solutions from outside of the GIZ portfolio, you may reach out to other bi- or multilateral development organisations such as UNDP's Digital X or USAID's Development Innovation Ventures. In addition to identifying demand, expert colleagues from within the GIZ regional departments can also prove helpful in scouting digital innovations, namely IT-Partners, Digital Partners, and Digital Ambassadors.

Assess Solutions

Assessing the information gathered in the [tool Solution Scalability Check](#) will enable informed decisions about which tested digital solutions have the highest potential to generate impact at scale. For that matter, the information collected in the [tool Solution Scalability Check](#) allows you to assess various dimensions while feeding into the [Scaling Vision](#) further down the scaling process. When assessing the solution(s), try to balance various dimensions such as the impact potential in terms of quality, quantity, relevance and sustainability with cost per impact.



Examples

Staying in touch with demand

Within GIZ, regional network events such as the Digital Africa Gathering (AFRICA) and Digital Transformation Call (APLAC) provide opportunities to directly reach out to expert staff on the GIZ country and regional levels. Ongoing conversations and relationships with expert staff from the country, regional, and sectoral department (FMB) can help you stay tuned with topical problems and demand for digital innovations and scaling processes. Among expert colleagues, you will find IT-Partners, Digital Partners, Digital Ambassadors with whom you can continuously engage.

Match solution and demand

Compare solutions via demand

The previously gathered research on demand and solutions now allows you to assess where a solution is best adaptable to a given demand and context. While some parameters will be easy to compare, others will require a deeper discussion inviting questions and ownership from both the **Impact Owners** and **Solution Providers**. This is also a great opportunity for the actors to directly engage, fill knowledge gaps and get to know each other in preparation of the opt-in or out of a scaling process. The conversation should be guided by your shared quest for relevant and sustainable impact at scale.

Opt for best fitting solution

Together with the **Facilitator**, **Problem Owners**, **Solution Providers** and **Enablers**, you will decide in which context to scale which solution for relevant and sustainable impact

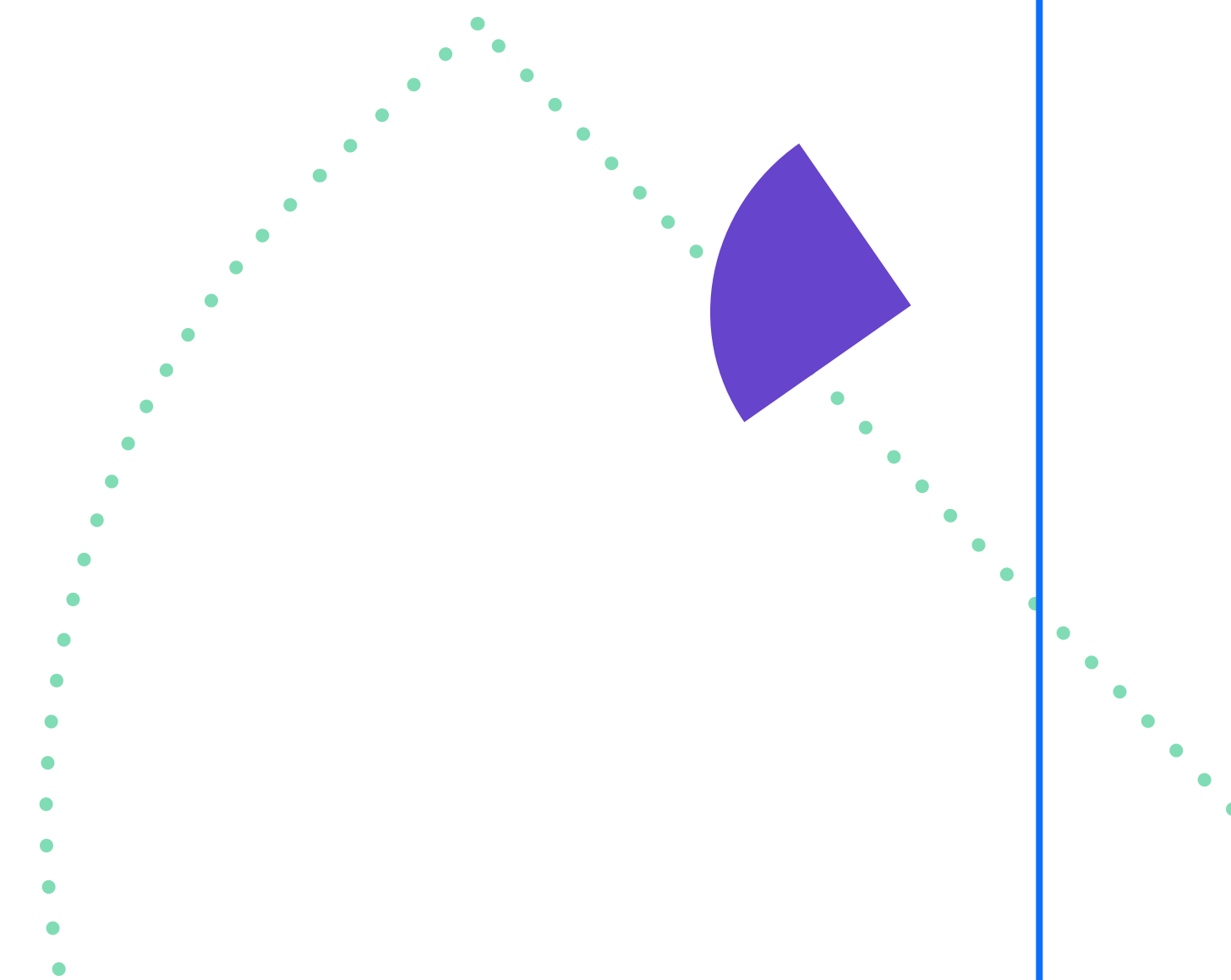
at scale. As you prepare to embark on an explorative and collaborative process, use the opportunity to also foster candid conversations about mutual contributions, needs, and concerns. This helps surface potential game-breakers such as funding or resource constraints. Moreover, such open discussions help build and maintain trust and co-ownership as the backbone of any scaling process. The **tool Team Collaboration Canvas** provides a starting point for this discussion, to be concretized in the next phase. When looking for a good match, favour proven digital solutions with the potential to address a concrete core problem of a target group. The ability to continuously adapt to the local context may be more important than a seemingly great fit at first glance. Moreover, as long as the digital solution has previously been deployed and tested in real life, it should not matter whether it originates from within or outside of the GIZ portfolio.



Examples

Invite the elephant in the room

When exploring the great impact potential of Clurb's Action tool for Disaster Risk Management with interested GIZ colleagues in partner countries, we spent quite some time discussing a match between the local demand and the solution. While it seemed to be a great fit, there was a growing elephant in the room which kept us from making a swift decision to stop or move forward. Only when we discussed implicit concerns by local municipalities who had not been sitting at the table with us, we were able to see that despite the great potential we needed to halt the process. This reminded us that scaling is never the default, but needs to generate relevant impact building on local ownership



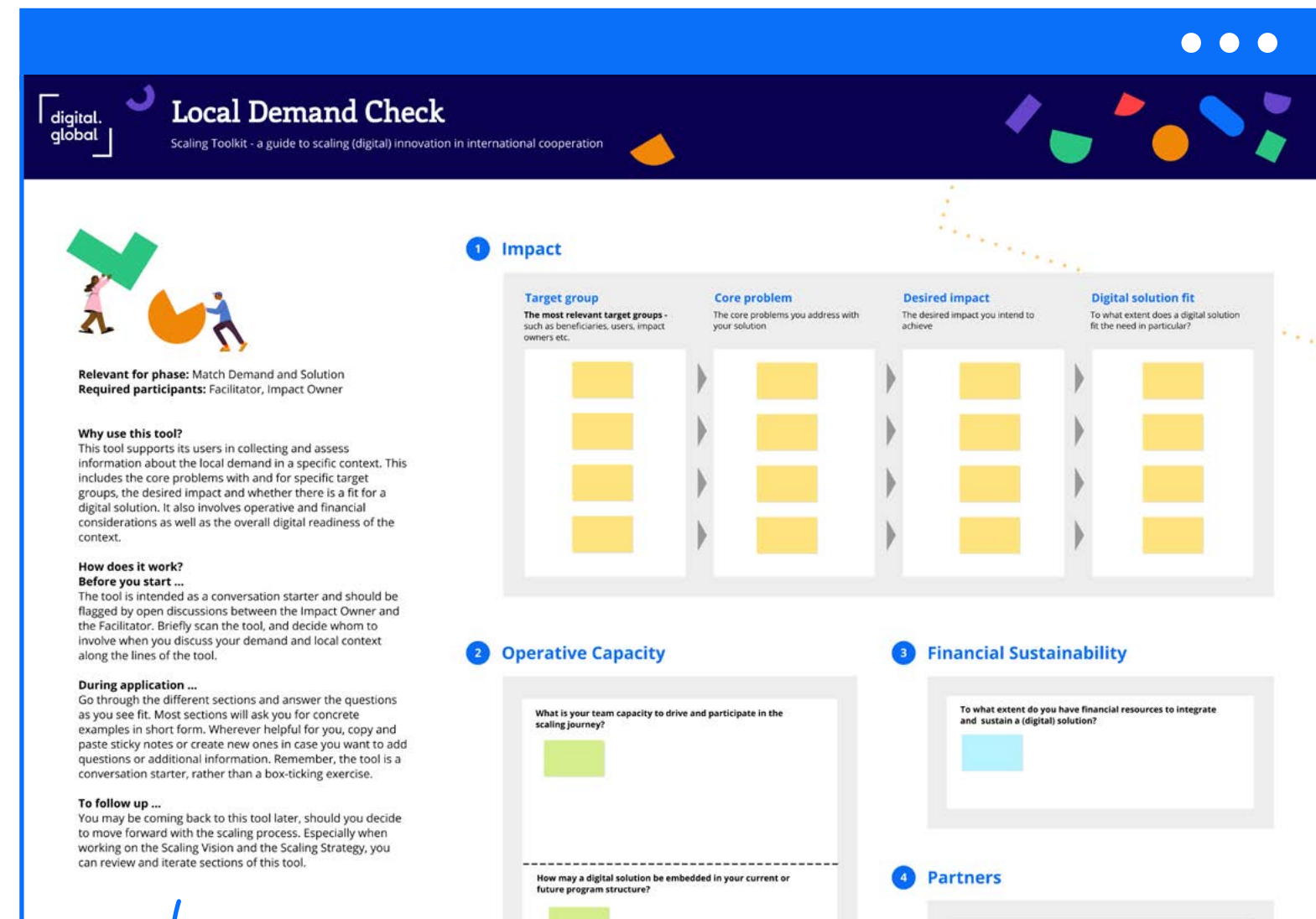
Phase 01: Match Demand and Solution

Helpful Tools

Match Demand and Solution

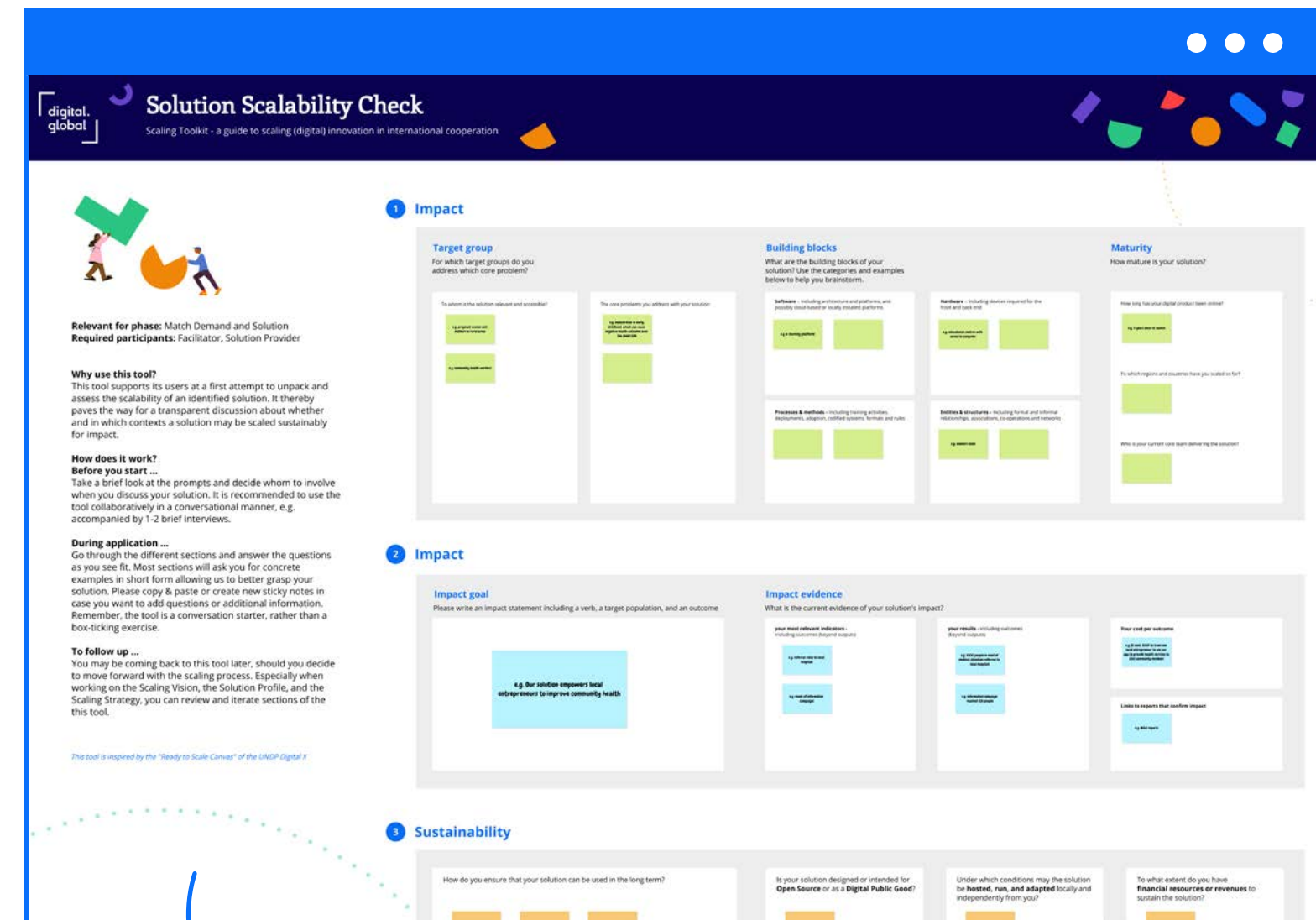
Local Demand Check

This tool helps collect and assess information about the demand by the **Impact Owner**, the needs by the end users for a specific digital innovation, and the perceived underlying problem. It fosters a first understanding about the digital readiness of the context, to what extent an innovation and scaling process could be integrated into existing programs and financing, and whether the problem at hand holds considerable potential for impact. Different sections will prompt the user of this tool to prepare and document their outreach to collect the relevant information obtained in discussions with various **Impact Owners**.



Solution Scalability Check

This tool helps its user to prepare the outreach to **Solution Providers** and capture the required information to initially assess solution's scalability, the problem(s) it is designed to solve and evidence about its former impact, and basic contextual requirements for the solution to become operational such as digital skills and connectivity. In order to assess a solution's scalability, the user of this tool is prompted to collect data both on technical as well as organisational aspects. Given that some of the required information may not be formalised, it is recommended to use the tool while engaging in interviews and exchanges with the **Solution Providers**.





Phase 02

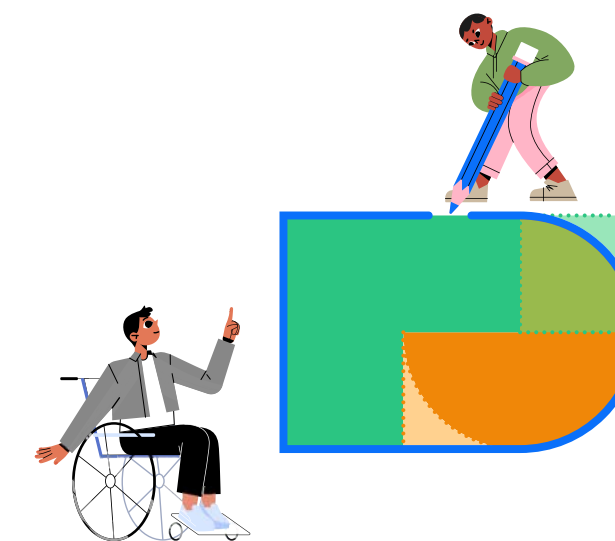
Develop Scaling Strategy

Let's co-create a robust, iterative, and co-owned strategy to harness the impact potential of solution and context.



Phase 02: Develop Scaling Strategy

Overview



Envision Scale

- Align on vision, roles and process
- Establish core team

After this step, we will have a clear vision and initial team set up, including

- a shared scaling vision, clear roles among key actors, and a shared process
- an onboarded core team ready to get started.

Understand Solution

- Understand solution and its components
- Identify required enablers

After this step, we will have an in-depth understanding of our solution, including

- insights on core, modular and hackable components
- required enablers needed to generate impact.

Understand target context

- Scope context analysis
- Aggregate findings

After this step, we will have a thorough understanding of our target context, including

- existing ecosystem of partners and initiatives in the field
- the core problem and target group needs
- most relevant contextual inhibitor and enabler for solving the core problem

Co-create Scaling Strategy

- Get on track to optimal scale
- Review learnings and define adaptations
- Consider scaling pathways
- Develop iterative action plan

After this step, we will have co-created a co-owned Scaling Strategy, including

- an updated Scaling Vision
- defined adaptations for solution and context to reach optimal scale
- an articulated action plan and timeline matching the target program's planning
- updated roles and commitment to the scaling process.

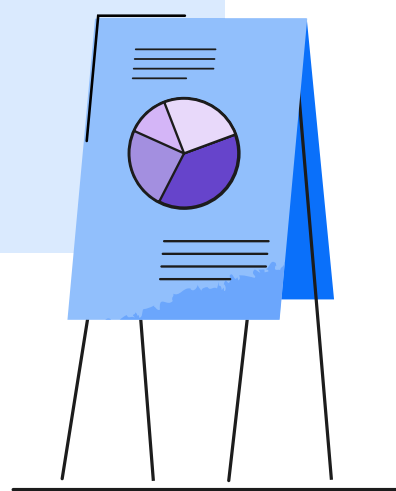
Phase 02: Develop Scaling Strategy

Roles



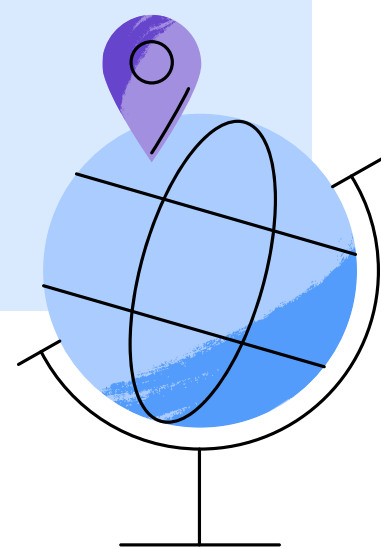
Facilitator

The facilitator will foster collaboration among the Impact Owner(s) and Solution Provider while inviting joint decision-making and planning for the co-owned scaling process. This may include suggesting means to jointly collect data and organising regular check-ins such as bi-weeklies for concrete planning. If helpful, they may guide all parties through the different steps of this phase. This will usually include the coordination and facilitation of meetings and workshops, documentation and follow-ups regarding jointly collected information. They may additionally keep an eye on changing ownership and time commitment by the involved parties to allow for timely discussions about shifting perspectives and expectations.



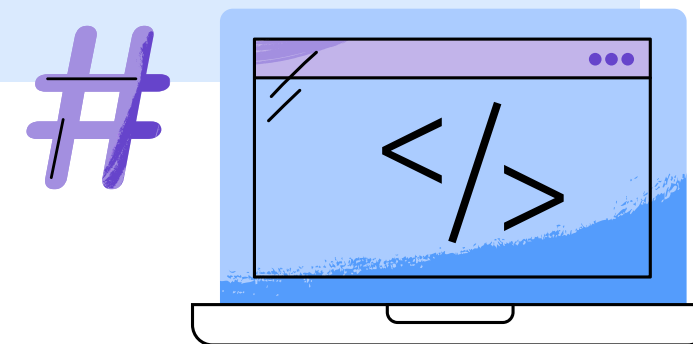

Impact Owner

Impact owners help emphasise the importance of the target context, its specificities, and needs with regards to the envisioned impact. Any scaled solution may only unfold its impact when it matches local conditions and target group needs. In many cases, the Impact Owner(s) may not have direct knowledge about the needs and core problems of the target group. However, they will support making the local perspective a guiding voice of the scaling process by providing further connections in their local partner network and/or supporting the research on local needs and conditions. The Impact Owner(s) and Solution Provider form the core team of the co-owned scaling process.




Solution Provider

The Solution Provider provides valuable information on the impact potential as well as the requirements of its solution. This phase may allow to deepen and structure this knowledge in such a way as to allow for meaningful adaptations of the solution to the target context. The Solution Provider also ensures that their solution will be met by required enablers in the target context. Their responsibility is to pull the information they need to understand the target context and to contextualise the solution together with the Impact Owner(s). Jointly, they form the core team of the co-owned scaling process as their knowledge and resources drive the co-creation of the Scaling Strategy.




Enabler

Enablers overall ensure that they use their capacities, networks, funding instruments, and advocacy as a true partner for the Impact Owner(s) and the Solution Provider. Especially in the step “Envision scale” it often makes sense to involve Enablers to assure the scaling process is based on a shared vision.

Phase 02: Develop Scaling Strategy

Keys to success

#1 Co-design for co-ownership

Co-design and iterate the scaling process in such a way that all involved parties shape it to serve the scaling vision while accommodating mutual benefits and available time resources. This is best enabled when everyone in the core team gets to regularly check-in with each other.

#2 Embrace complexity

Understanding the target context and iterating the scaling vision will greatly benefit from local knowledge and perspectives. They help us appreciate the complexity of the local context, the target group(s), and the core problem at hand.

#3 Talk about scaling

Foster learning and cross-pollination with stakeholders, experts, and decision-makers by sharing why, what and how you set out to scale your solution in the new context. Looking for allies and inviting diverging perspectives on target groups, core problems, and scaling vision helps our scaling process to continuously learn.

#4 Sustainable impact

Engaging with potential partners and stakeholders, e.g. when understanding the context, can create fertile ground for lasting relationships and sustainable impact. Anchoring your scaling process in the local ecosystem will help ensure ownership as much as pertinence of the impact for local target groups.

#5 Keep it iterative

When designing the scaling pilot at the end of this phase, bear in mind that it may unfold its impact over time rather than being a one-shot-solution. Based on continuous learning and iteration from helpful metrics and test-learn-loops, your team will keep steering your pilot toward impact at optimal scale for this very target context.

#7 Establish clear leadership

Clear roles and facilitative leadership in the core team ensure that everyone contributes most effectively with their specific resources, knowledge, and perspectives.

#8 Go for diversity

Inviting diverse cultural backgrounds, genders, disciplines, and perspectives in the core team benefits holistic and robust thinking. This helps you leverage different knowledge and perspectives toward your scaling pilot and eventually toward optimal scale.

Phase 02: Develop Scaling Strategy

Steps

Envision Scale

Align on vision, roles and process

A scaling process requires a team of diverse actors to understand and continuously tailor solution and context to each other in pursuit of relevant and sustainable impact at scale. A collaborative workshop setting helps provide the adequate space to openly discuss and align on a shared scaling vision, helpful roles and responsibilities as well as a process timeline. You may combine two tools to provide focus and space for the key discussions. The **tool Scaling Vision** invites you to synthesise and rethink information collected in the first phase of the scaling process, including preliminary target groups, core problems, and desired impact (later to be iterated in the **Scaling Strategy**). Moreover, the **tool Team Collaboration Canvas** prompts an open discussion about the roles and the process timeline. This allows everyone to assume a role, share responsibilities and openly communicate needs or requests for the collaborative process to be truly co-owned. Where possible, try to give special voice to actors representing the local demand as this is what will guide your scaling process toward optimal rather than maximum scale.

Establish core team

The core team (consisting of **Impact Owners** and **Solution Providers**) is the driving force of the scaling process and should be set up appropriately at the beginning. Involving stakeholders on the ground as **Impact Owners** can be very helpful to put the local context and impact at the centre

of the process. Building on previous discussions about roles, contributions, needs, and overall process, the core team requires ongoing attention by its members and the **Facilitator**. Take some time to discuss next steps regularly. Clearly allocate responsibilities and openly check what everyone needs in order to co-own the scaling vision and process as it unfolds. Even simple bi-weekly check-ins can make all the difference in keeping momentum, ownership, and clarity about responsibilities. The **Facilitator** may particularly look out for the core team and their ways of collaboration. However, some core teams may also feel comfortable to self-organise.

Understand Solution

Understand the solution and its components

A solution may be described as a set of components allowing it to unfold its impact in a certain context. Components may include technical hard- and software, (good) practices, internal and external capacities involved in the delivery of the solution, or also interactions with the end users. Unpacking a solution into its components helps clarify which ones are hardwired into the solution (core) or may be adapted (modular, hackable). We also gain a deeper understanding of which aspects of a solution mainly contribute to impact. The **tool Solution Profile** prompts this discussion and more. It builds on information previously collected in the **tool Solution Scalability Check** and invites a focus on impact by means of a Theory of Change.

Identify required enablers

Once you have gained more clarity regarding the solution's components and their contribution to impact, the **tool Solution Profile** invites you to take a closer look at what these components require to jointly generate impact. Core components point to requirements or **Enablers** that need to be met by the target context, while modular and hackable components show where the solution may be tailored to the new context. Collecting required **Enablers** for the solution to unfold its impact informs how you may analyse and perhaps concretize the target context. Feel free to come back to the **tool Solution Profile** anytime, e.g. when planning the context analysis and writing the **Scaling Strategy**.

Look at the trees in the solution forest

When exploring how to scale the Smart Africa Digital Alliance to Latin American contexts, we plotted the components, including services, activities, etc. on the Theory of Change. This helped us understand which components concretely generated impact and which others were (good) practices, thus embedding and ideally enabling the core activities in specific contexts. We also gained a more differentiated view on the solution's adaptability: while the solution had been built on core components such as capacity building for smart regulation, the specific contents and training formats could be modularly adapted to the target context's specific needs.

Examples

Understand target context

Scope context analysis

Exploring the target context and respecting its complexity is crucial for your **Scaling Strategy** and the aim to achieve relevant impact at scale. As every scaling process is different, you will also need to jointly determine which depth of analysis is necessary and sufficient at what stages of your scaling process. The common denominator of the following approaches is to seek a better understanding of the core problem and related needs, through an ecosystem, human-centred, and/or systems lens.

- Ecosystem Approach

Depending on available resources and time, you may choose to scan the ecosystem for existing partners and initiatives working to achieve similar or complementary impact. Building on their available research and their strategic priorities may provide you with a first understanding of the core problems, target groups or users. This can enable you to create a rather high-level **Scaling Strategy** based on explicit context hypothesis to be tested and iterated during the ensuing roll-out.

- Human-centred and Systems Approach

In case resources and time allow, your research will ideally also involve potential users and local stakeholders. By directly engaging, you can gather first hand information on the needs and the core problem your solution should be addressing in this very context. Moreover, it can allow you to jointly create a context-specific system map or causal loop diagram around the identified core problem. This systems approach will enable you to look for **Enablers**, inhibitors, and leverage points which your solution may harness for optimal scale.

Aggregate findings

There is no means of analysis fitting all sizes. However, the **tool Context Analysis** not only builds on previously collected information which you can now reuse and iterate (**tools Solution Profile**, and **Local Demand Check**). It also provides a way to aggregate information on the target group's needs and the core problem irrespective of what means of analysis you jointly chose for your scaling process.

Co-create Scaling Strategy

Get on track to optimal scale

Essential for the development of a scaling strategy is the mutual tailoring of both, solution and target context, to the end of iteratively reaching optimal scale and impact. The digital solution, namely its components, need to be adapted in order to deliver impact for the context's target group(s), the core problem and related needs. Similarly, the target context itself often requires preparation, e.g. in terms of capacity building, ecosystem activation, or regulatory approval. Take your time to review previously collected information, define adaptations and flesh out your iterative action plan.

Review learnings and define adaptations

The tool **Scaling Strategy** first invites you to review the **tool Scaling Pilot Canvas**. It serves as a starting point as it outlines the jointly envisioned impact and prompts repeated discussion about what optimal scale means for your scaling process. The **tool Solution Profile** provides hands-on information on components and required **Enablers** which can be reused and iterated at this stage. The **tool Context Analysis** will provide further information on the target context, the target group(s), core problems and needs. All

Examples

Understanding our solution helped concretize our target context

When jointly reviewing which components of the Smart Africa Digital Alliance were core, modular or hackable, we also learned much more about the potential target countries we should be looking at. After having started off with a regional focus, we understood that for the initial scaling, we should prioritise countries which could readily meet some of the solution's requirements. For example, we learned that existing partner relations were a required enabler to the component "deliver and certify trainings in-country". This benefited our country selection, context analysis and eventually the overall impact potential.

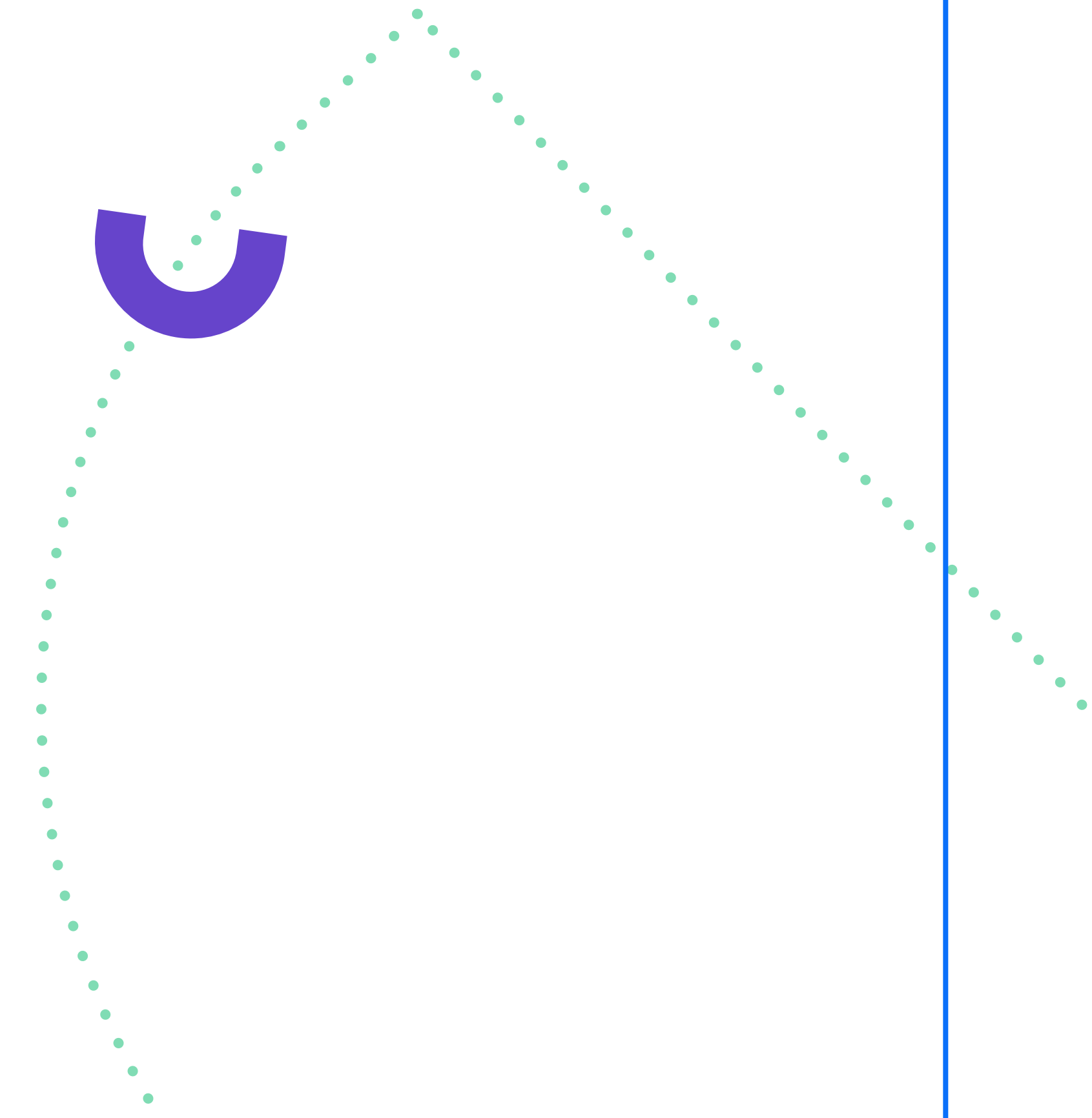
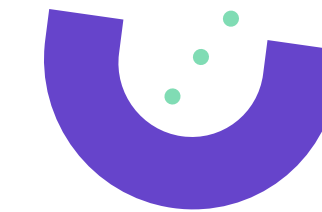
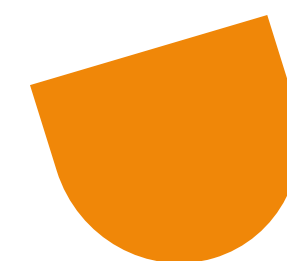
three tools feed into the **Scaling Pilot Canvas** and help you define necessary adaptations to mutually prepare the solution and the context. There will most likely be tricky decisions to make given that designing the solution for optimal scale is art rather than science. However, bear in mind that you are designing for an iterative roll-out toward optimal scale. When considering adaptations to reach optimal scale, consider the scaling pathway(s) you are tapping into. Most scaling processes do not follow one, but rather merge multiple pathways including, but not limited to scaling up, out, functionally, or deep. However, considering the different routes may help you think of how solution and context may best fit each other for optimal scale and impact.

Develop iterative action plan

The **tool Team Collaboration Canvas** allows you to discuss and decide together which activities are required to build the adaptations and, tentatively, which core activities and milestones will structure the further implementation. Since the adapted solution will in many cases be embedded in other programs that follow their own timelines, be sure to communicate proactively and plan accordingly. Your action plan will not only enable you to roll-out the defined activities, but also to continuously adapt the scaled solution in iterative build-test-learn loops. Consider taking note of key assumptions, hypotheses or learning indicators which may inform the loops. Moreover, the action plan should be backed by open discussion of your roles, clearly assigned responsibilities within the core team and flagged by required external capacities and partners for support. Special attention should also be paid to activities ensuring the necessary funding throughout the scaling process. Exploring required capacities from the action plan will helpfully feed into the **tool Capacity Needs Assessment** and inform your outreach to potential partners in the next phase.

Formulate scaling strategy

Use the information generated in your process to formulate a convincing and action-oriented scaling strategy. Ideally, a scaling strategy includes a scaling vision (see the elements target audience, core problem, intended impact of the tool Scaling Vision Canvas), a definition of the scaling pilot (see the elements adapted solution, required preconditions, partner network, sustainable high-level business model of the tool Scaling Pilot Canvas), a description of the operational scaling team and an action plan (see the elements of scaling team and action plan of the tool Team Collaboration Board). These elements can be combined as needed into a scaling strategy tailored to inform and engage the relevant stakeholders and decision makers in the implementation of the scaling.

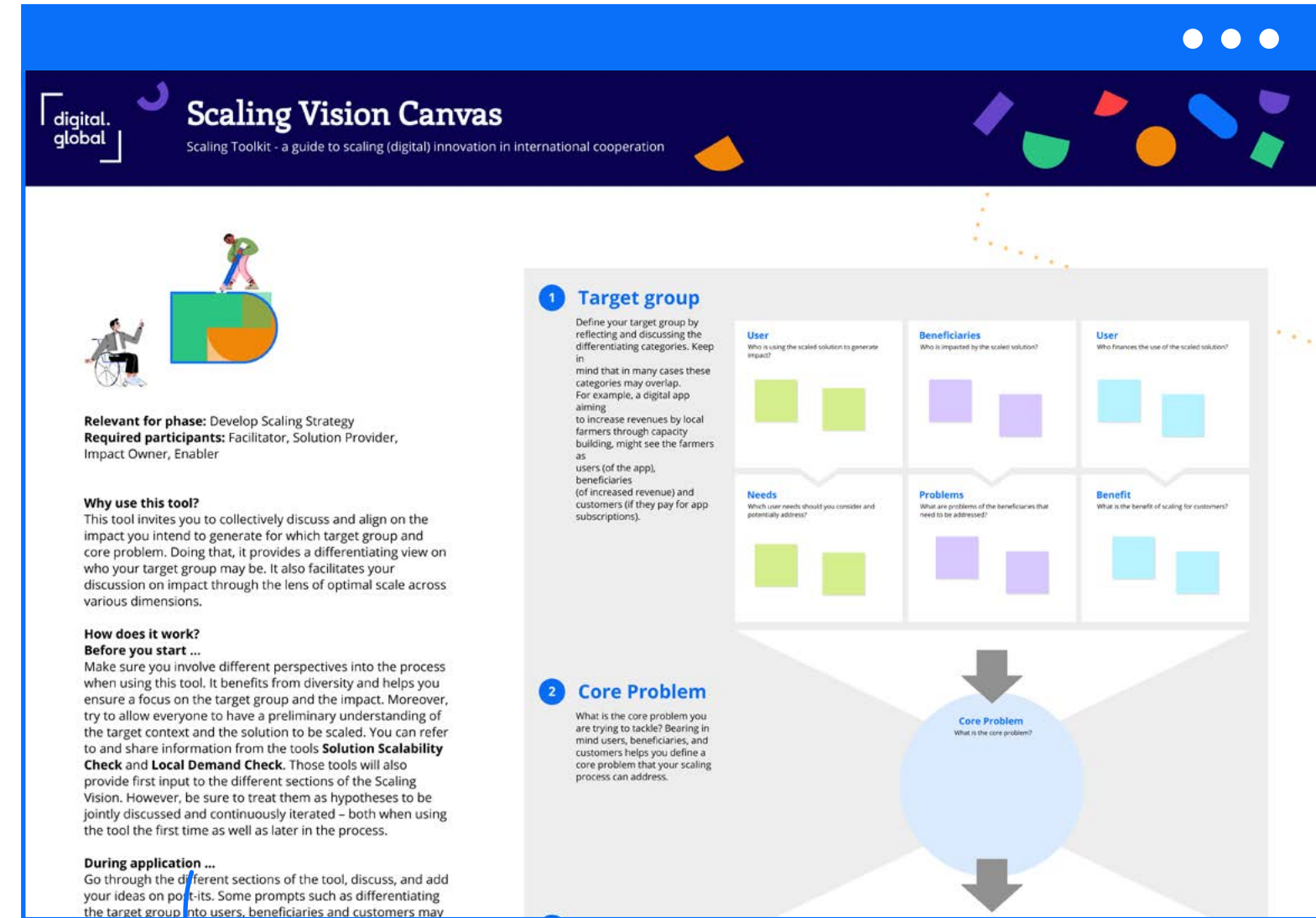


Phase 02: Develop Scaling Strategy

Helpful Tools

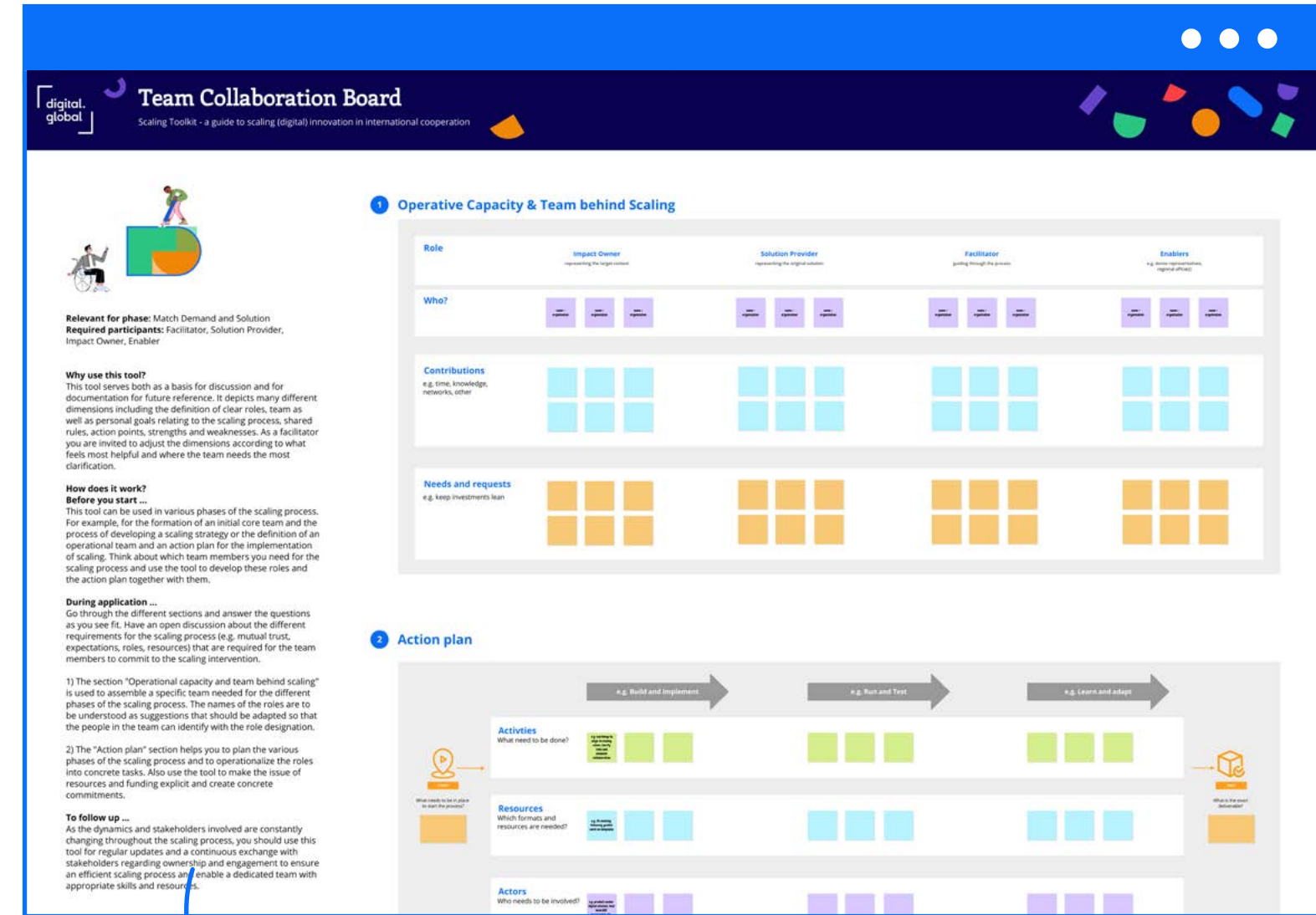
Scaling Vision Canvas

This tool offers a template to be used during a facilitated workshop. It allows present stakeholders to voice and discuss their perspectives while also pointing to perspectives of absent stakeholders. It aims at providing an eye-level space for an alignment of perspectives from the **Impact Owner**, **Solution provider** and **Enablers**. The format allows us to harvest rich input on the intentions, expected impact goal, potential scaling pathway and preliminary success factors. However, some of the most important work follows after the format. We then use the input to synthesise and suggest an encompassing vision respecting the various perspectives in order to play it back to stakeholders and use it for the next tasks.



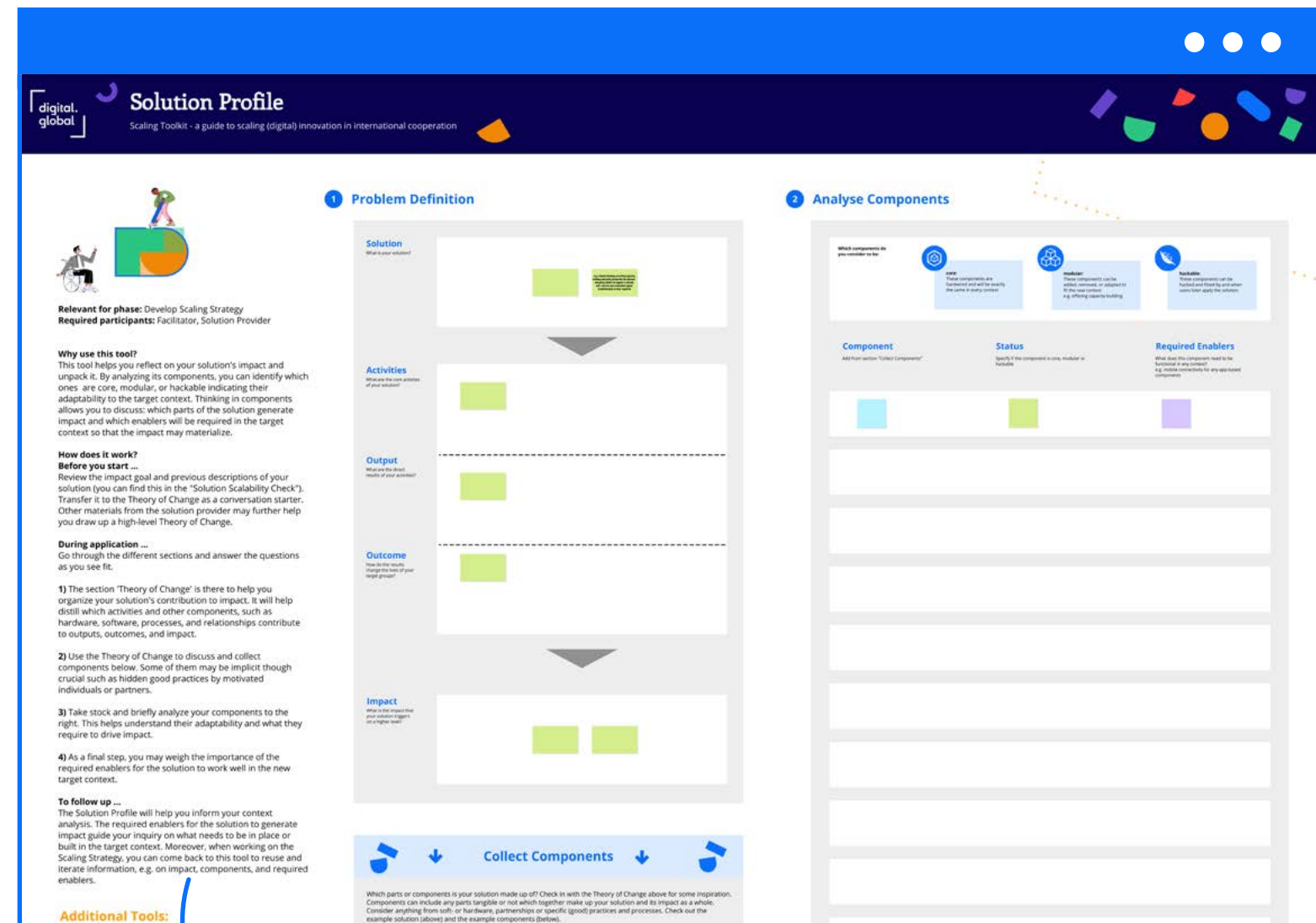
Team Collaboration Board

This tool serves both as a basis for discussion and for documentation for future reference. It depicts many different dimensions including the definition of clear roles, team as well as personal goals relating to the scaling process, shared rules, action points, strengths and weaknesses. As a **Facilitator** you are invited to adjust the dimensions according to what feels most helpful and where the team needs the most clarification.



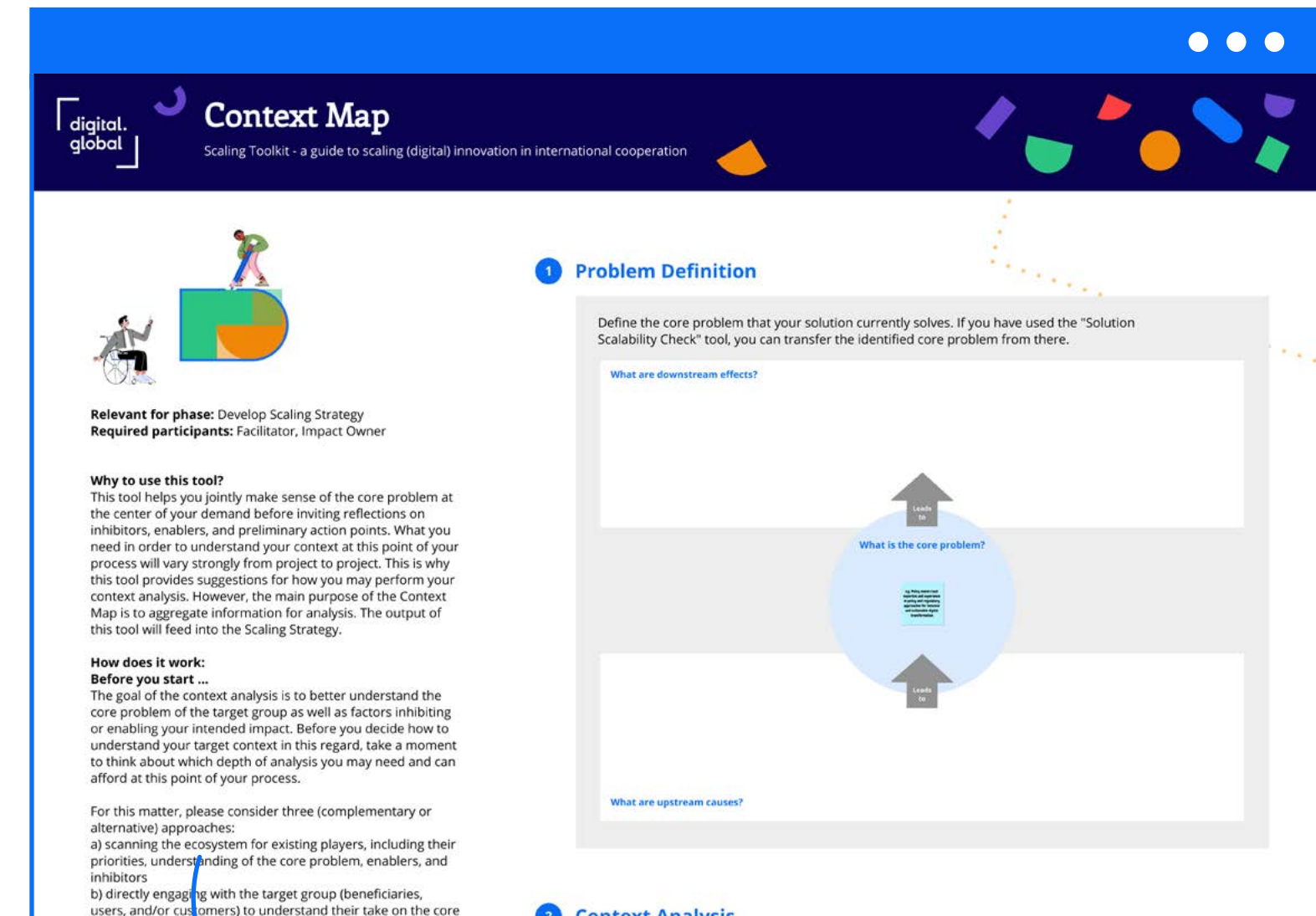
Solution Profile

This tool facilitates the decomposition of the solution into its various components at the technical, process, and organisational levels that are needed to create impact. Identifying the core components that are modular and can be hacked helps the team understand where the solution has the potential to be adapted to local contexts and where it is more static. This helps identify requirements that the solution must meet in order to become operational. Solution requirements for context conditions that are necessary for the solution to work can also be more easily identified based on this tool.



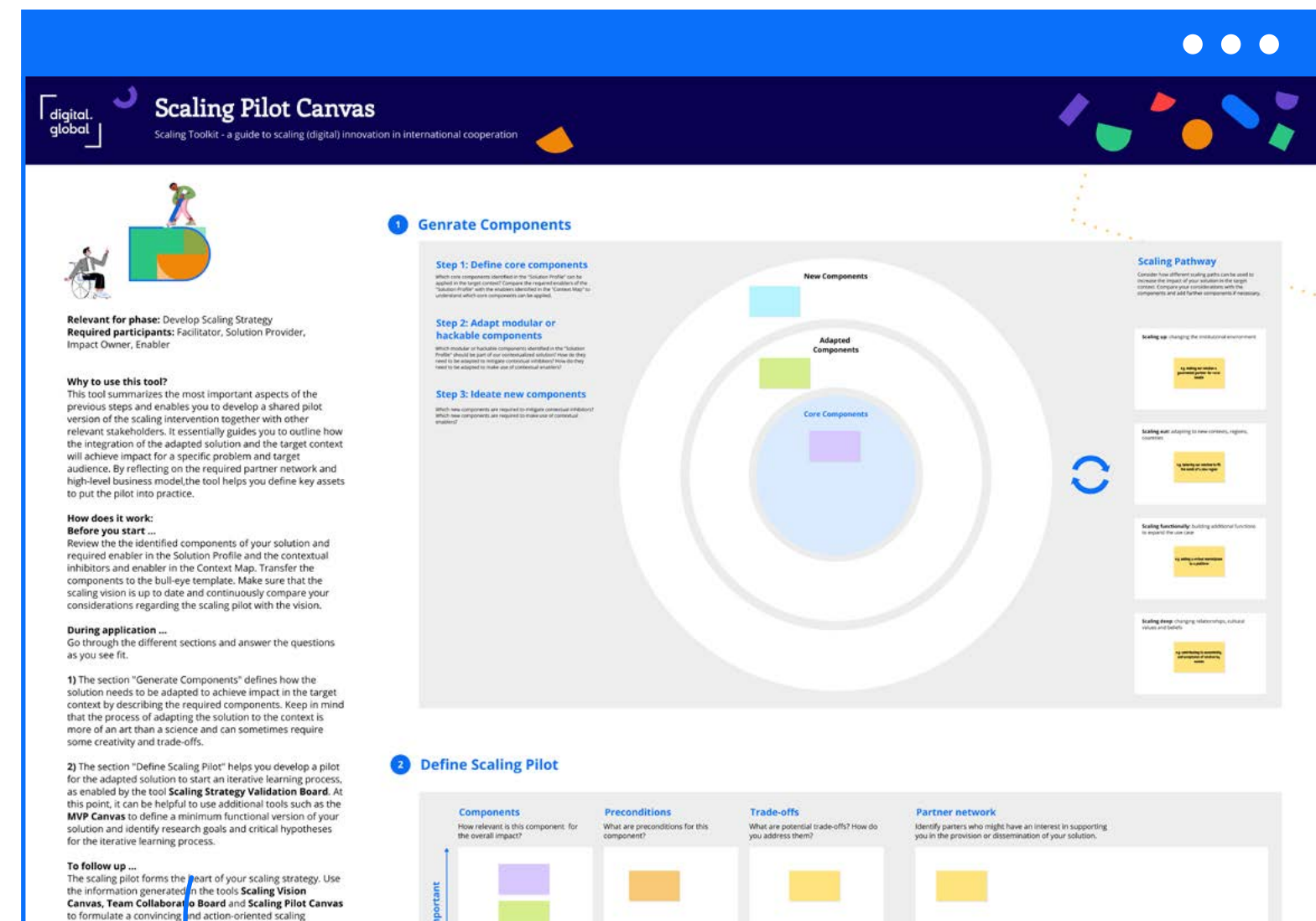
Context Map

This tool consists of a set of topics that are queried using research methods and can incorporate other analysis methods, such as stakeholder analysis. Working closely with local experts, key contextual factors (such as political, economic, social, technological, environmental, and legal factors) are analysed and documented in the new environment where the solution will be scaled. This helps the team better understand how some critical elements of the contextual environment are likely to impact scaling efforts and explore potentials to counteract inhibiting factors.



Scaling Pilot Canvas

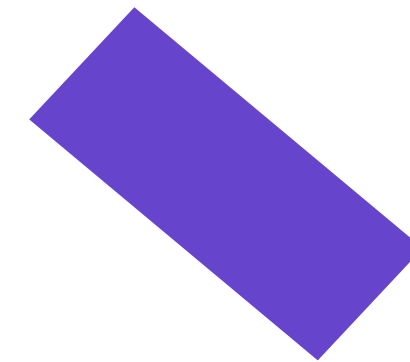
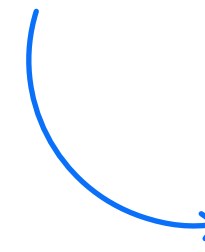
This tool summarises the most important aspects of the previous steps and enables you to develop a shared pilot version of the scaling intervention together with other relevant stakeholders. It essentially guides you to outline how the integration of the adapted solution and the target context will achieve impact for a specific problem and target audience. By reflecting on the required partner network and high-level business model, the tool helps you define key assets to put the pilot into practice.



Additional Tools

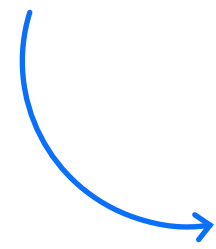
...to understand your solution

When unpacking your solution into its various components, our Solution Profile focuses on Theory of Change to emphasize impact. However, components may be looked at from additional vantage points including from the customer journey and the business model. The following tools invite you to explore these perspectives as well.



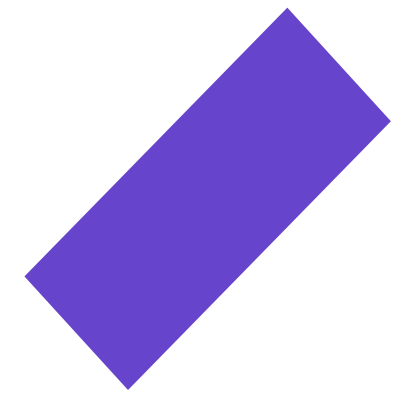
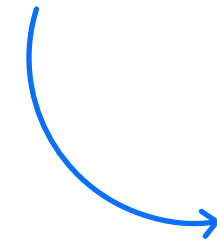
...to understand your context

As described in the respective tasks and the Context Map, how you approach your context analysis greatly depends on your resources and needs at this point of the process. The following tools provide complementary or alternative approaches to clarify the core problem as well as contextual inhibitors and **Enablers**.



...to iterate your impact in loops

Similar to your Scaling Strategy, some tools invite us to think iteratively on continuous build-test-learn-loops based on a minimum viable product or service. Consider the following tools for further inspiration.





Phase 03

Establishing Preconditions for Scaling

Let's build the inner and outer preconditions to bring our solution to life in the target ecosystem.



Phase 03: Establishing Preconditions for Scaling

Overview

Partner-Network Activation

- Reach out to partners
- Co-create partnership model
- Onboard partners

After this step, we will have activated a robust network of partners, including

- clear partnership models
- partners' input and co-ownership of the scaling strategy
- an onboarding directed at enabled and trusted collaboration.

Team and Leadership

- Define leadership
- Establish team

After this step, we will have clarified the leadership and team model, including

- a co-created and shared understanding of operative responsibilities
- continuity of leadership
- an established team ready to get started.

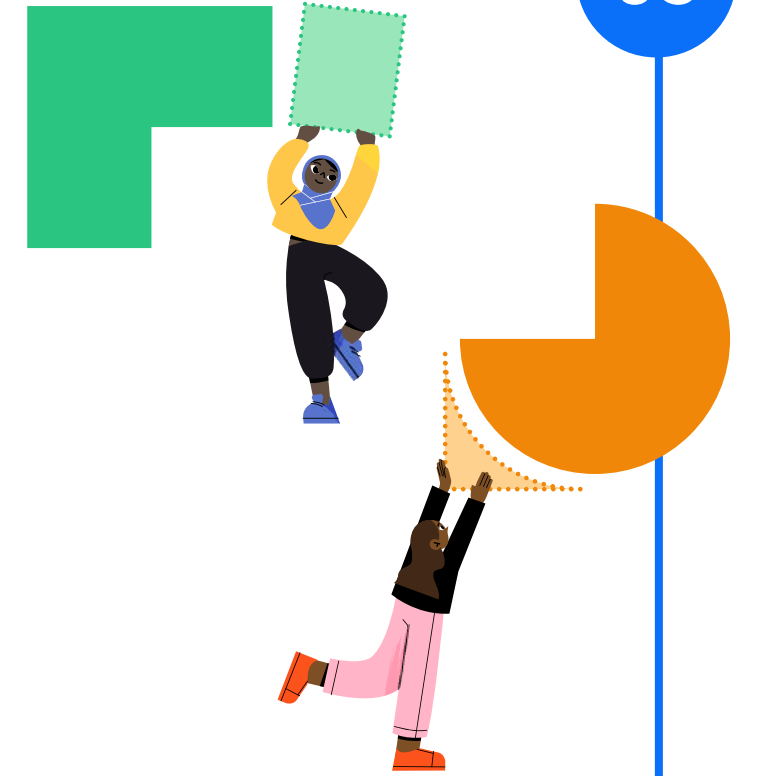
Legitimise change (optional)

- Identify key stakeholder
- Reach out and engage

After this step, we will have cleared support and acceptance for the intended impact, including

- by key political, civil society and private sector stakeholders in the target context
- creating planning security for the implementation phase.

03



Establish Preconditions for Scaling

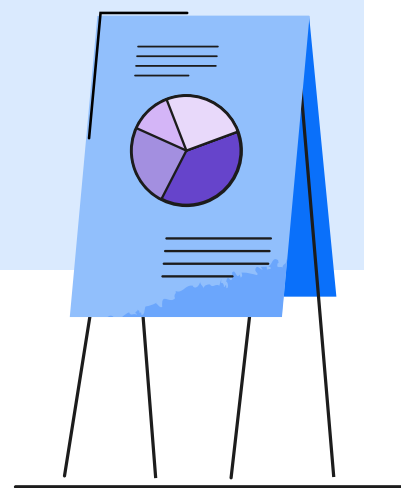
Phase 03: Establishing Preconditions for Scaling

Roles



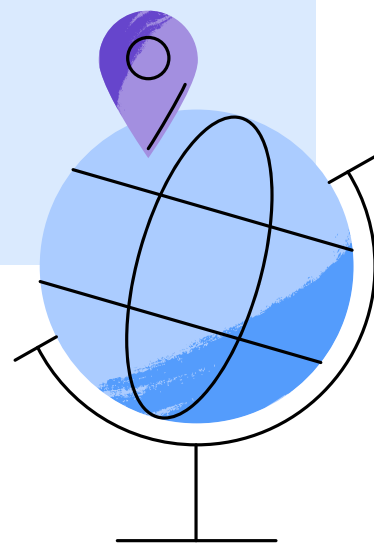
Facilitator

In some cases, the facilitator may have stepped down as the core team of Impact Owner(s) and Solution Provider will fully self-organise during this and the next phase of the scaling process. However, in other cases, the role may still be assumed by an internal or external party. If so, the focus continues to lie on enabling joint collaboration, coordinating next steps, as well as organising, moderating and documenting working sessions. They continue keeping an eye on co-ownership and gathering the right voices around the table so that the scaling process aims for relevant and sustainable impact at scale.



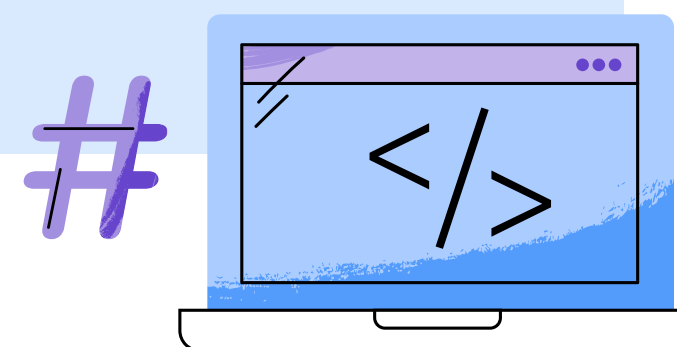

Impact Owner

The Impact Owner(s) will particularly provide existing and build new connections within their local networks. The scaling process largely depends on co-ownership not only within the core team including the Solution Provider, but also with key partners who will be onboarded in this phase. Inviting perspectives to collaborate and iterate the Scaling Strategy will be crucial to generate relevant and sustainable impact at scale. Any contextual preconditions for the success of the scaling process should also be a focus of the Impact Owner(s).



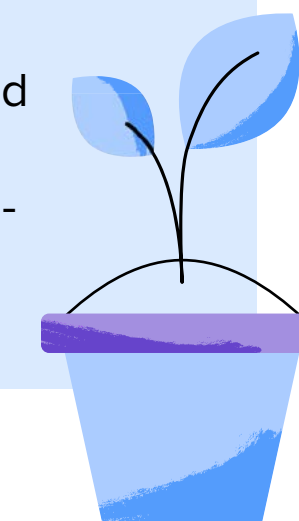

Solution Provider

The Solution Provider will closely work with the Impact Owner(s) to reach out to and activate partners in the target context. They will ensure that the solution is being adapted according to the Scaling Strategy. The Solution Provider may also support or provide any needed trainings and capacity building with local stakeholders to ensure their co-ownership.




Enabler

Enablers will be crucial to activate the partner network, to obtain regulatory approval where needed and to ensure funding for the scaling process. They should act as a true partner for the Impact Owner(s) and the Solution Provider.



Phase 03: Establishing Preconditions for Scaling

Keys to success

#1 Co-design for co-ownership

When establishing preconditions for scaling, additional partners may be coming onto the scene. Ensure that the process accommodates their perspectives in order for the scaling vision and pilot to be co-owned by all parties.

#3 Talk about scaling

Foster learning and cross-pollination with stakeholders, experts, and decision-makers by sharing why, what and how you set out to scale your solution in the new context. Engaging with potential partners is a two-way-path to learning and generating impact.

#4 Sustainable impact

When building capacities for scaling, try to ensure you are building them to last. Inviting and enabling the ecosystem to own and sustain the impact ensures its sustainability beyond project cycles.

#9 Fully invite partners

When partners share your scaling vision and see real benefits for their own goals, they are more likely to tap into their strengths and networks to help you generate impact. Partners' perspectives and their proximity to your target group can enable you to deliver relevant and sustainable impact.

#10 Learn from opposition

Any reservations or resistance your scaling vision may provoke in stakeholders may be an opportunity to iterate your solution toward co-ownership or to ensure sustainable impact through the right advocacy angle.

Phase 03: Establishing Preconditions for Scaling

Steps

Establish Team and Leadership

Define leadership

Establishing the preconditions for scaling benefits from clear leadership with the support of the local GIZ structure and the donor(s); joint leadership between the **Solution Provider** and the **Impact Owner** can be conducive to this. The team's capacities for self-organisation and facilitation of the scaling process should also be nurtured to increase independence from external support.

Establish team

Based on the **Scaling Pilot Canvas** and the **Team Collaboration Board**, a team capable of driving scaling with long-term commitment is defined by leadership and the core team. A team members and roles may be changing with evolving partner structures, feel free to continuously check in with all involved parties. Formats such as bi-weeklies are recommended to ensure co-ownership and clear responsibilities.

Activate Partner-Network

Reach out to partners

Based on the preconditions outlined in the **Scaling Pilot Canvas**, the **tool Capacity Needs Assessment** invites you to reflect upon required capacities to jointly bring the scaling process to fruition. This may be a call to involve external partners or to build internal capacities. Before reaching out to potential partners, the **tool Partner Value Proposi-**



Examples

Clear leadership enables contributions from multiple stakeholders

In the scaling process of community-driven women business centres from Bangladesh to Nigeria, Kenya, and Malawi, the solution provider United Purpose-Self Help Africa (UP-SHA), assumed leadership of a 12-month pilot period following a range of scaling labs. This phase allowed for the in-depth analysis of user and community needs around which concrete and locally-offered health and nutrition services were to be tailored. The process strongly benefited from support of local stakeholders as well as the respective GIZ field staff. However, the leadership assumed by the solution provider with funding from the BMZ allowed an iterative implementation of the scaled model.

tion provides further guidance to consider potential partner profiles, mutual benefits, and more. This may help you communicate transparently and manage expectations accordingly. In order to identify a range of potential partners, consider tapping into the networks of existing partners including donors. When reaching out, the initial conversations around collaboration may benefit from a focus on partners' interests, needs, and challenges related to the scaling vision and process.

Onboard partners

When onboarding new partners, invite an open discussion about roles, needs and commitment on the basis of the **Team Collaboration Board**. Inviting your partners' diverse



expertise and perspectives on the **Scaling Pilot Canvas** and overall **Scaling Strategy** helps you enrich the pilot while fostering co-ownership. To start the collaboration as smoothly as possible, there should be regular reflection on how the collaboration is working and how tasks are distributed. Providing support for capacity building with partners can be a key part of establishing preconditions for your scaling pilot.

Legitimise change

Identify key stakeholder

The tasks of legitimising change and building a constituency of interest require an understanding of the political environment and the key stakeholders involved in the (potential) scaling-up process. Based on the context analysis developed during the scaling strategy development (see „Understand Context), an understanding of the policy environment is reflected and specific relevant stakeholders (game makers and breakers) are identified. The **tool Advocacy Plan** provides concrete guidance for this step.

Reach out and engage

Legitimacy involves placing the need for change at the top of decision makers' agendas. It requires the emergence of political „champions“ with credibility and influence and a willingness to use this political capital to support the intervention. Activating appropriate political decision makers takes time and resources. Leveraging pre-existing relationships is important to make this process efficient.

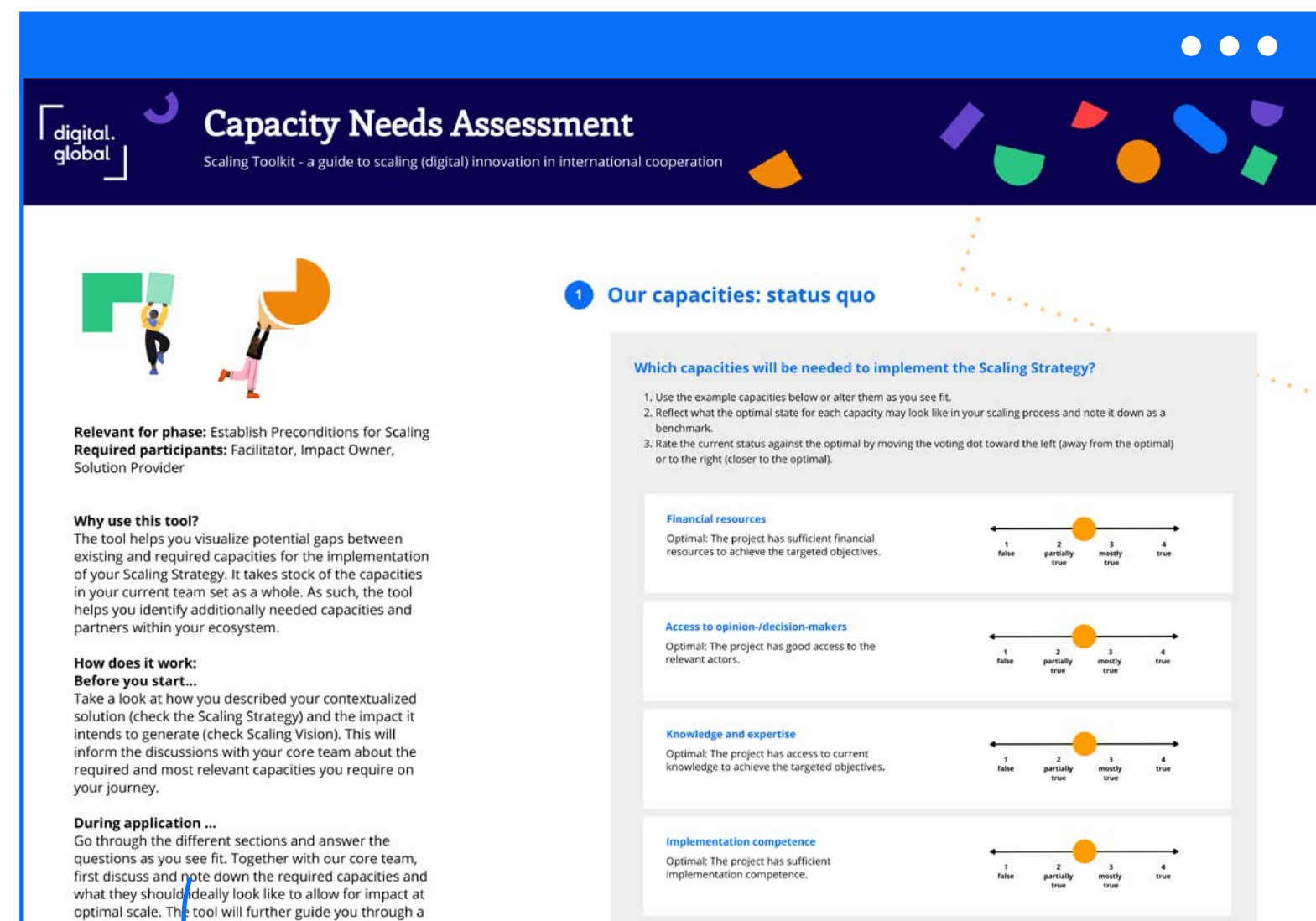
Phase 03: Establishing Preconditions for Scaling

Helpful Tools

Establish Preconditions for Scaling

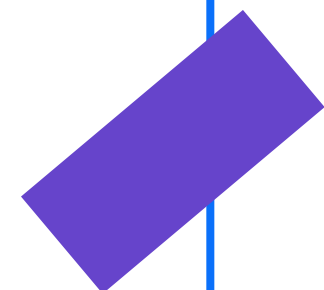
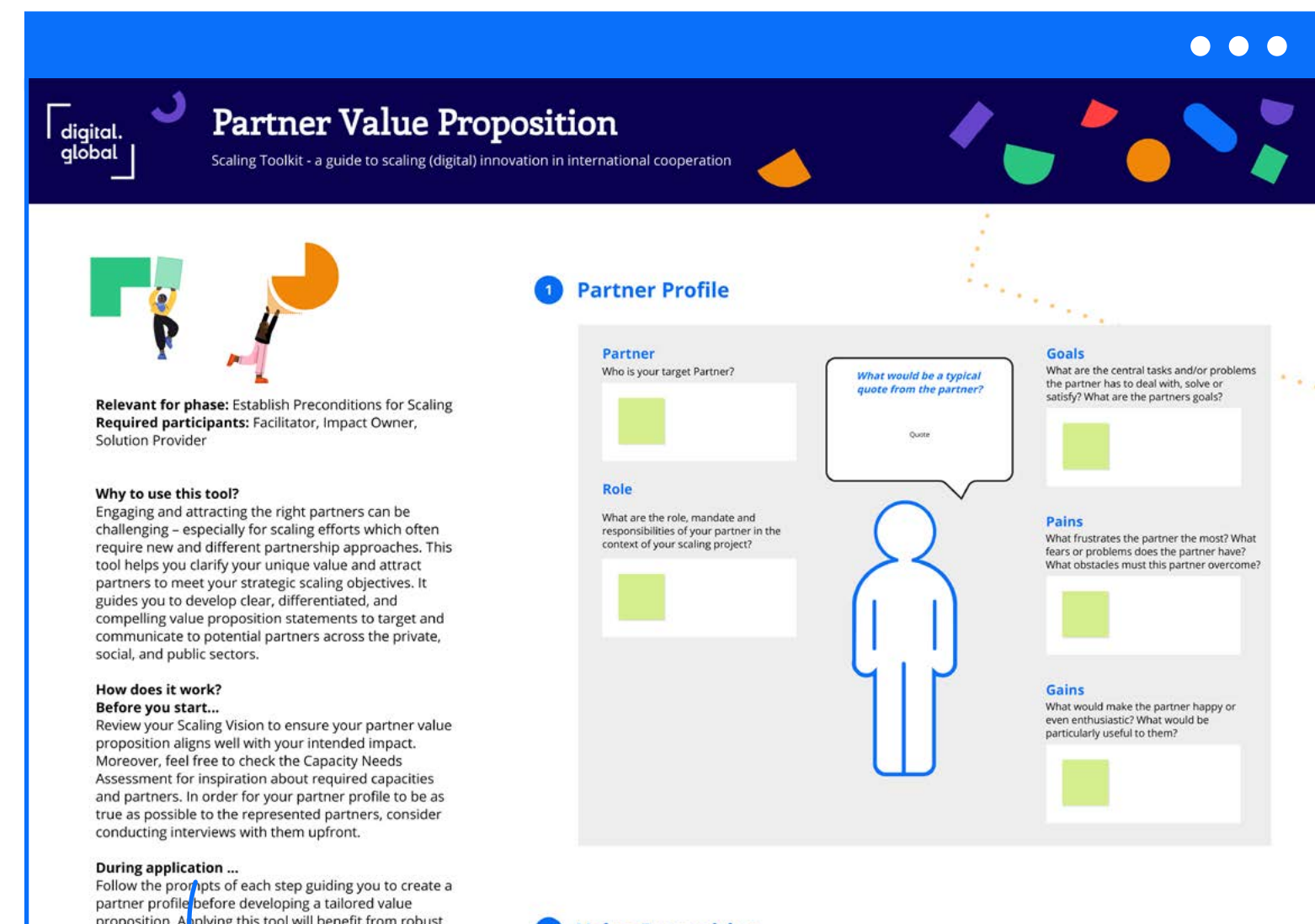
Capacity Needs Assessment

This tool allows its user to assess the current level of capacities available in the current project set up and to identify required capacities and pre-conditions for scaling. Working on an initial assessment will already be helpful while co-creating the scaling strategy. Iterating it during later phases of the scaling process will inform concrete action for capacity building for the core team and partners.



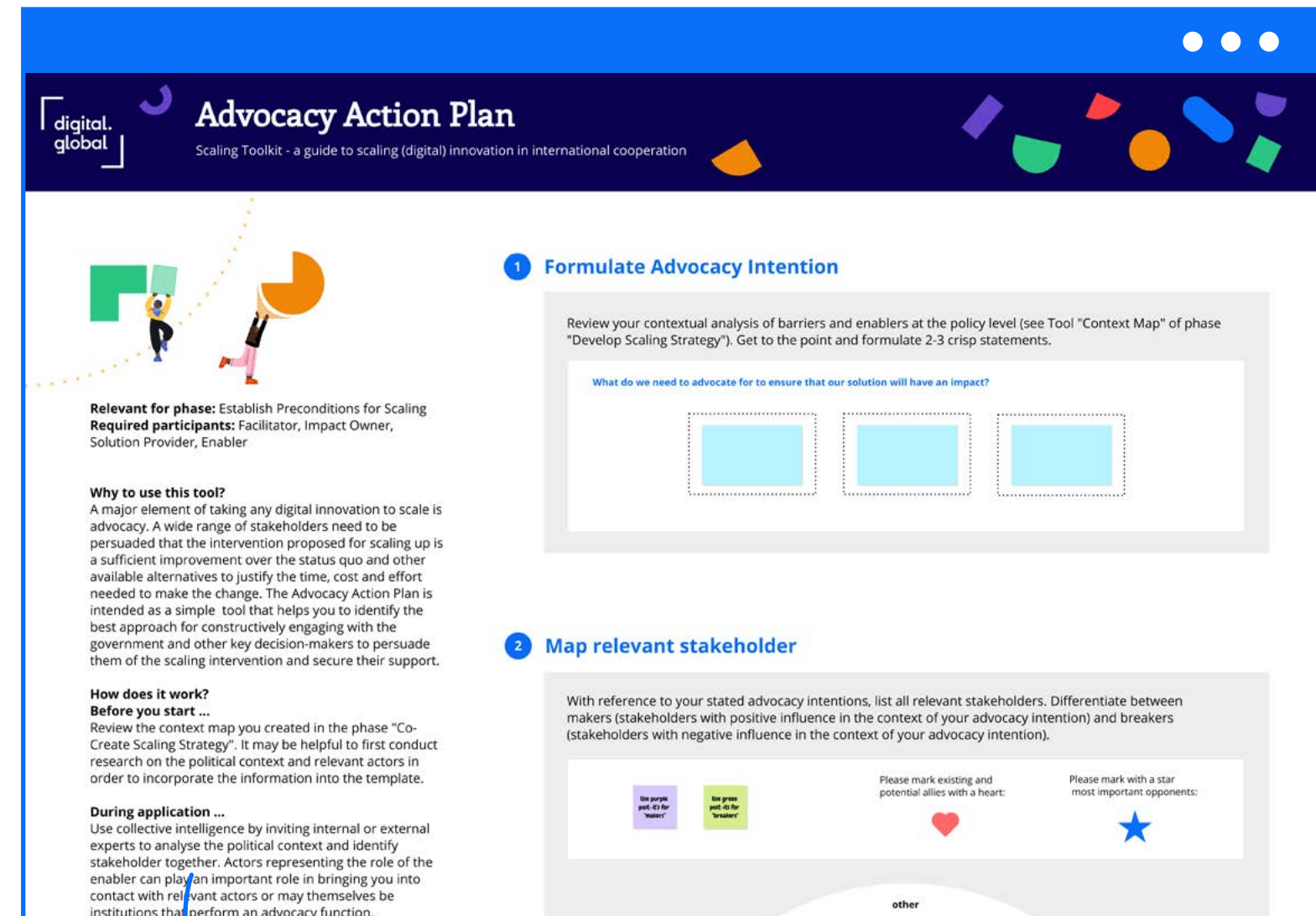
Partner Value Proposition

Engaging and attracting the right partners can be challenging – especially for innovation efforts which often require new and different partnership approaches. The Value Proposition tool helps you clarify your unique value and attract partners to meet your strategic innovation objectives.



Advocacy Plan

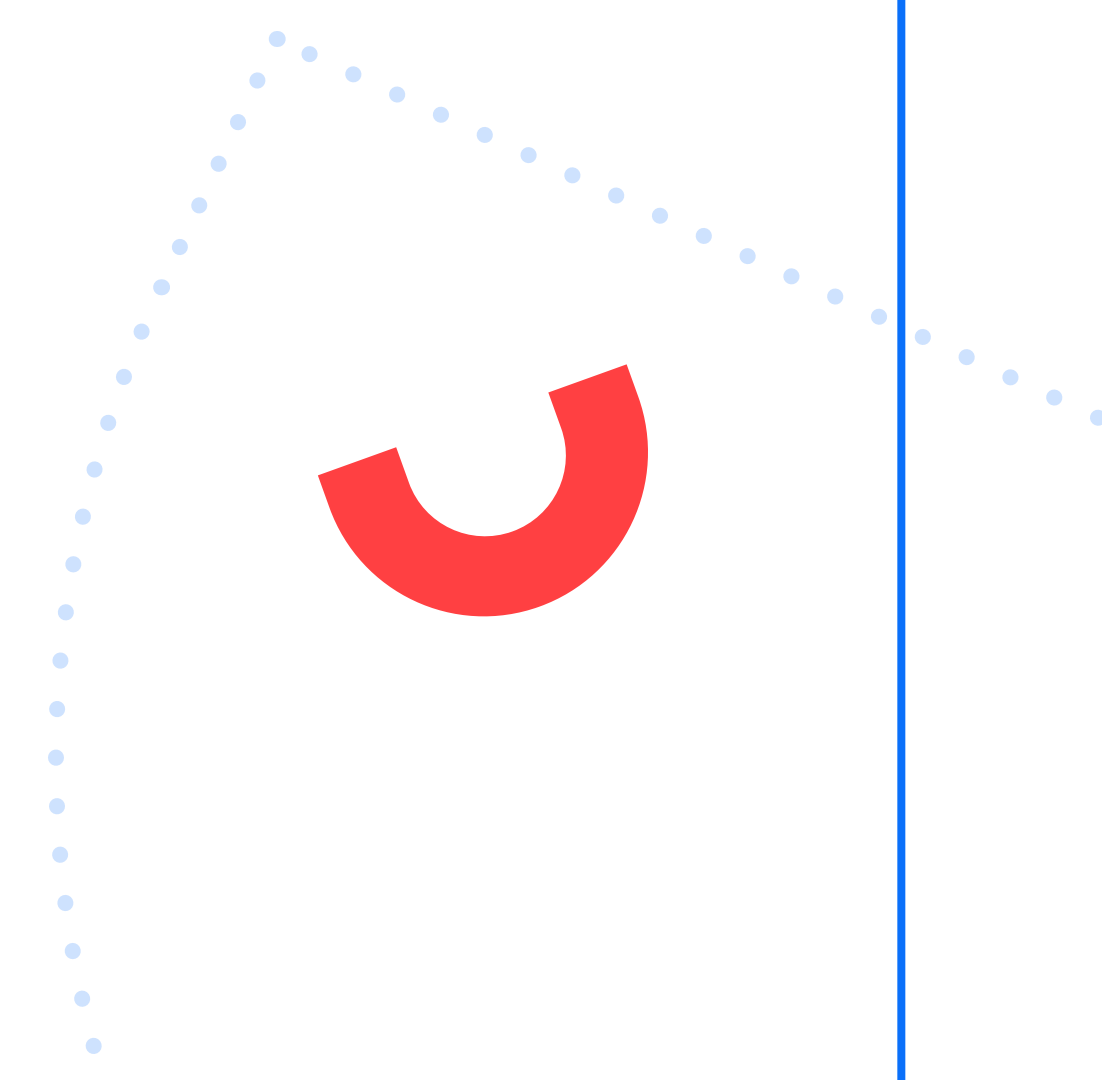
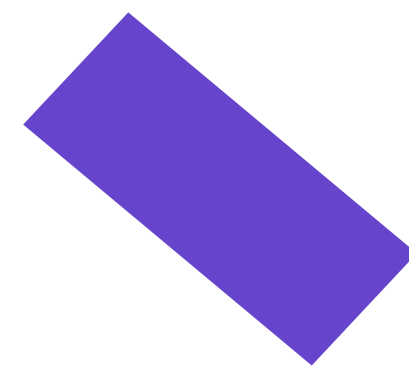
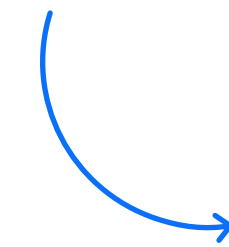
A major element of taking any digital innovation to scale is advocacy. A wide range of stakeholders need to be persuaded that the intervention proposed for scaling up is a sufficient improvement over the status quo and other available alternatives to justify the time, cost and effort needed to make the change. The Advocacy Strategy Profile is intended as a decision-support tool that helps advocates choose the best approach for constructively engaging with the government and other key decision-makers based on the realities of the political and administrative environment, the group's organisational structure and the resources available to them.

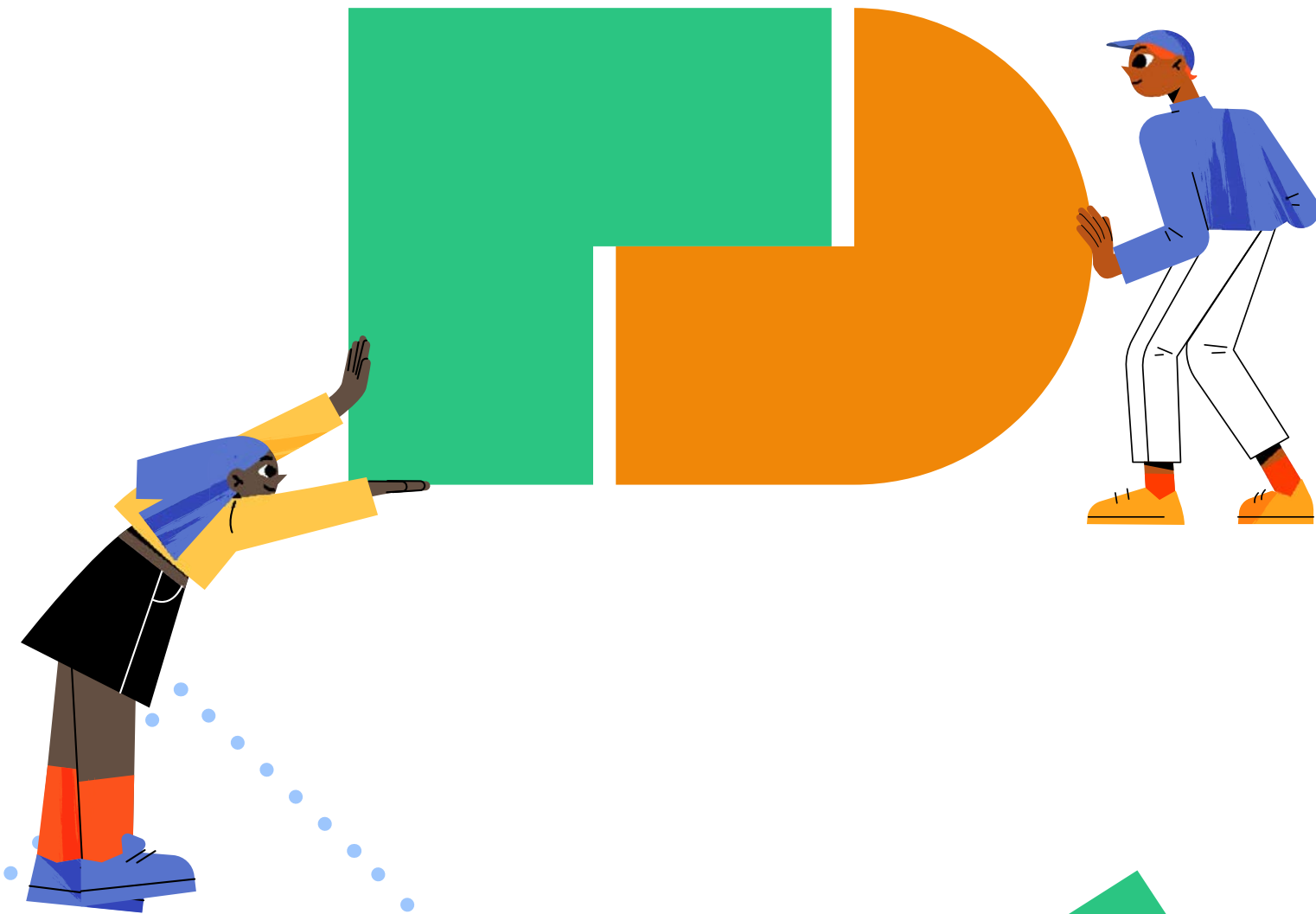
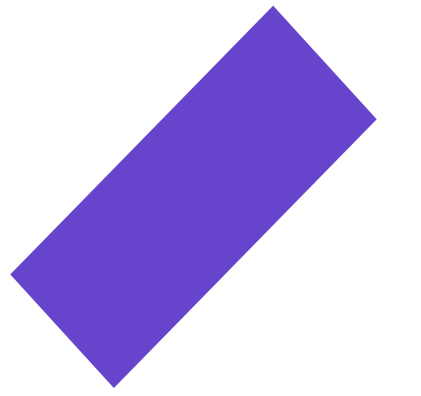
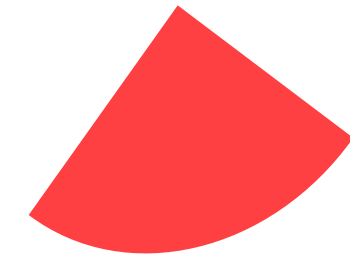


Additional Tools

... to engage with partners based on shared interests

Similar to the Value Proposition Canvas, some tools help us capture stakeholders in relation to how they may benefit from or contribute value to our value proposition. This can be helpful when one aims to foster alignment and mutual benefits with (potential) partners in the ecosystem.





Phase 04

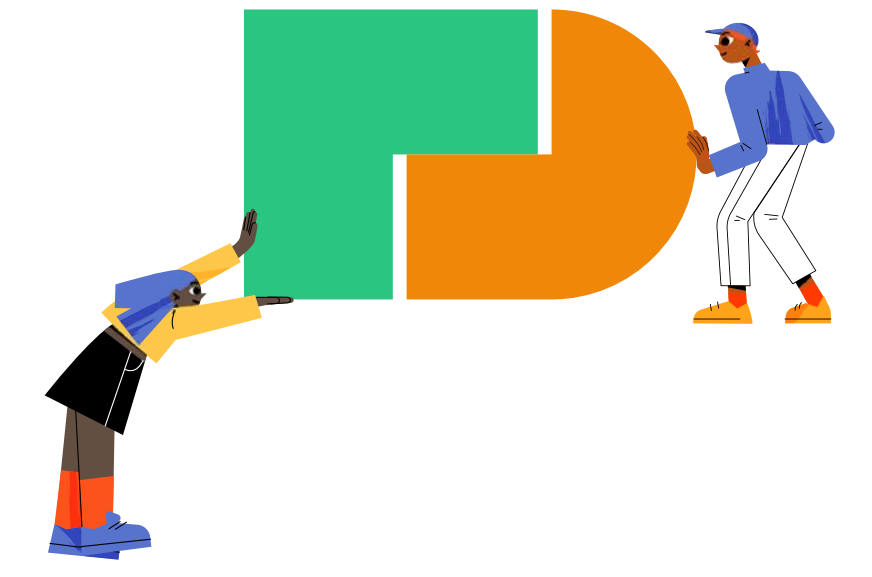
Implement Scaling

Let's realise optimal scale and impact through continuous learning between solution and context.



Phase 04: Implement Scaling

Overview



Build Capacities

- Empower local stakeholder
- Build and strengthen team capacities

After this step, we will have begun enabling our partners and key actors, including

- building required capacities
- clarifying first steps and responsibilities in the scaling strategy

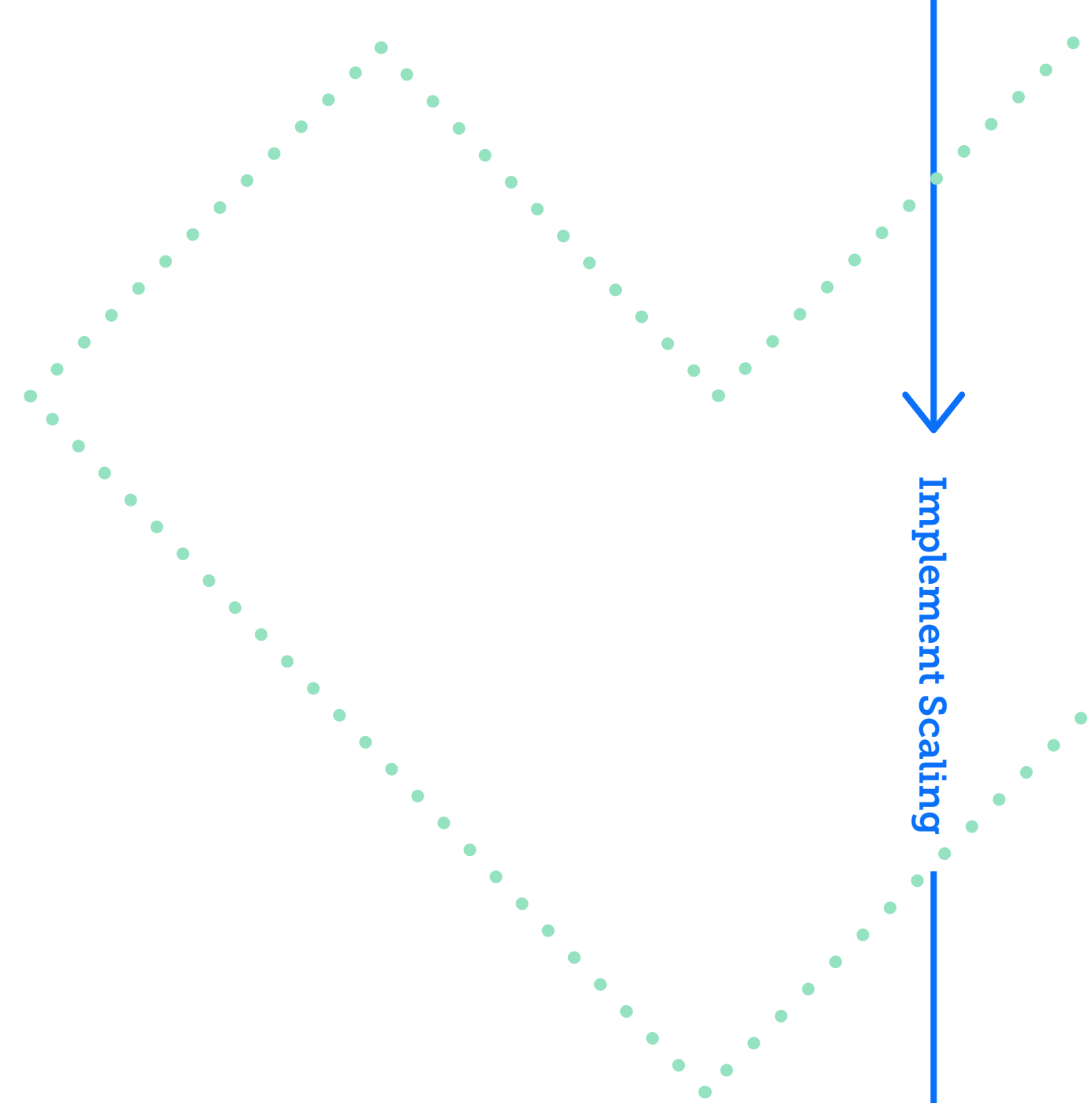
Learn and Adapt

- Build a minimal version
- Learn continuously and collectively
- Improve and adapt solution

After this step, we will have structured the iterative implementation of the solution, including

- facilitating build-test-learn loops
- gathering of evidence and definition of adaptations of solution and context
- continuous monitoring and managing of requirements and success factors
- learning exchanges among the team across partners

Implement Scaling



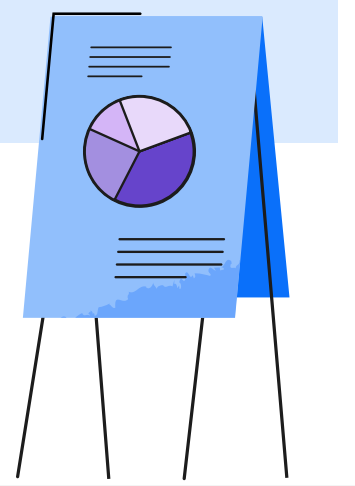
Phase 04: Implement Scaling

Roles



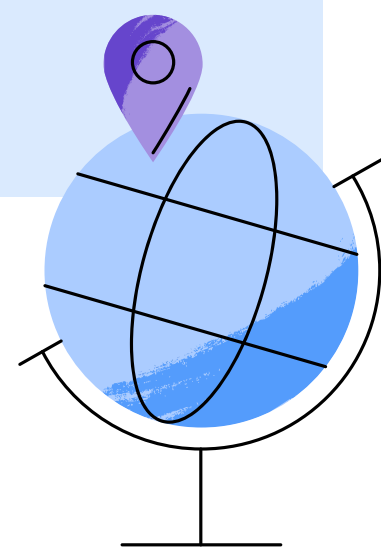
Facilitator

In some cases, the facilitator may have stepped down as the core team of Impact Owner(s) and Solution Provider will fully self-organise during this and the next phase of the scaling process. However, in other cases, the role may still be assumed by an internal or external party. If so, the focus continues to lie on enabling joint collaboration, coordinating next steps, as well as organising, moderating and documenting working sessions. They continue keeping an eye on co-ownership and gathering the right voices around the table so that the scaling process aims for relevant and sustainable impact at scale.



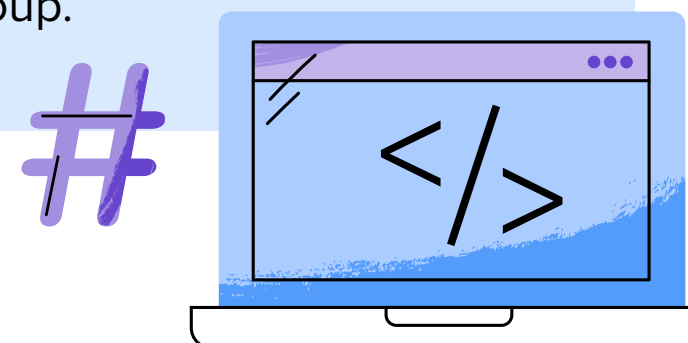

Impact Owner

The Impact Owner(s) help foster local co-ownership as close as possible to the end beneficiaries and target groups of the contextualised solution. Embedding the solution in the local ecosystem is what will allow it to sustainably unfold impact at optimal scale. For this to materialise, the Impact Owner(s) in tandem with the Solution Provider continue to adapt the solution to the context and vice versa. They also continue to enlarge the partner network involved in the scaling process wherever helpful.



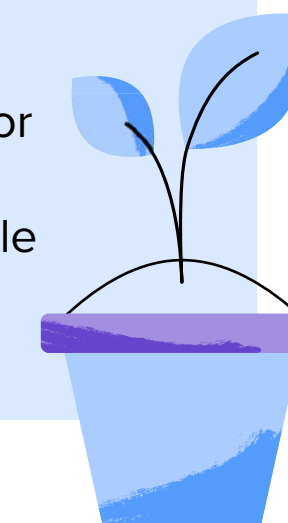

Solution Provider

The Solution Provider will co-design and harness the iterative build-test-learn-loops for the continuous and impact-driven improvement of their contextualised solution. In tandem with the Impact Owner(s) and local partners, they will closely monitor and iterate their scaling path toward optimal scale and impact. At times, this may require incremental “updates” to the solution and target context. In some cases, this may require a strategic pivot, that is, a more comprehensive shift, e.g. to focus on a vertical or adjust the core target group.




Enabler

Enablers will continue to act as a true partner in the scaling process. Their support in terms of funding, networking, and regulatory approval will enable the contextualised solution to reach optimal scale. As every scaling process is different in nature, transparent communication and listening to evolving needs will be most crucial for the generated impact to be truly relevant and sustainable at scale.



Phase 04: Implement Scaling

Keys to success

Implement Scaling

#4 Sustainable impact

Aim for sustainable and relevant impact beyond project cycles by favouring lasting capacities and ownership in the local ecosystem.

#5 Keep it iterative

Rolling out your scaling pilot is a continuous journey toward impact at optimal scale for your target context. Helpful metrics and test-learn-loops will support learning and iteration. However, it also requires you and key partners to remain flexible and open when considering needed adaptations or major pivots of your scaling pilot.

#6 Balance interests

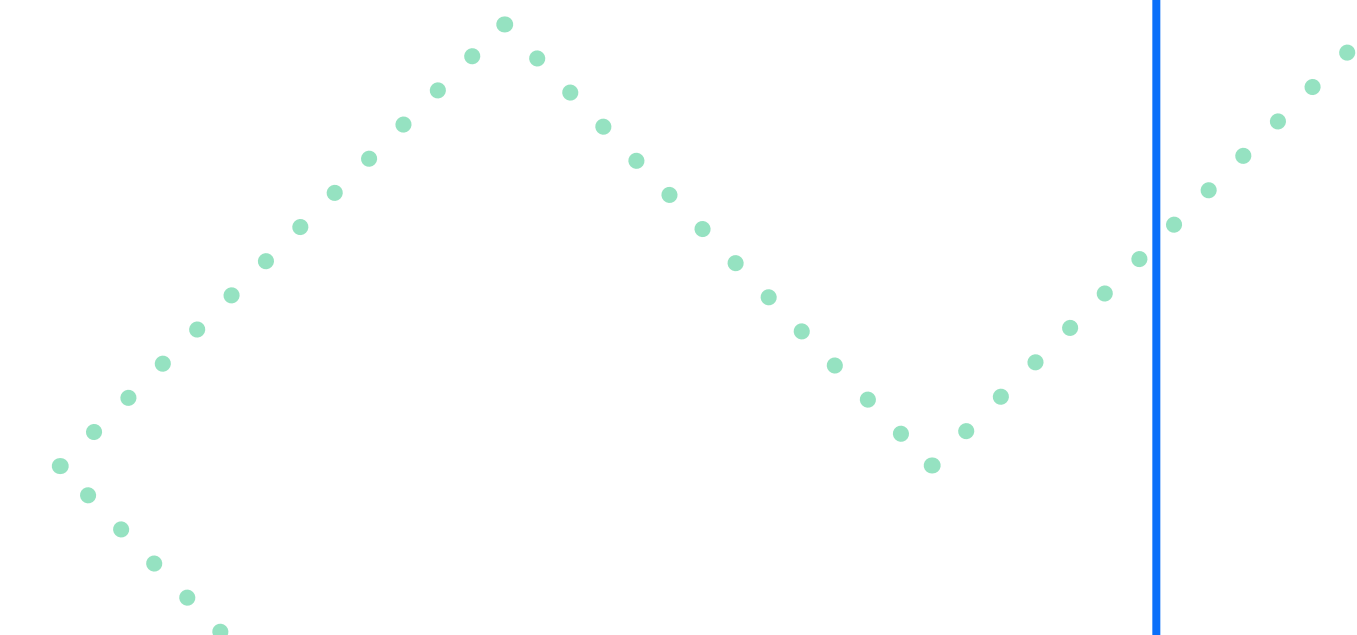
As you will continuously be iterating your scaling pilot, bear in mind that potential trade-offs may arise. In some cases this may include balancing interests from key partners. Whenever you need to accommodate donors' interests, try to make sure that local needs and demand remain the guiding star of your intended impact at optimal scale.

#9 Fully invite partners

Your partners will in many cases be the backbone of your scaling pilot. Their buy-in and co-ownership will not only support the roll-out but also the continuous improvement of your pilot. Invite their perspectives whenever possible to ensure that you anchor your pilot in the local ecosystem while delivering relevant and sustainable impact.

#10 Learn from opposition

Rolling out your pilot may invite mixed reactions from the ecosystem or other players. Try to leverage whatever resistance may arise as an opportunity to iterate your scaling pilot, its vision or the way you communicate about it.



Phase 04: Implement Scaling



Steps

Build and Strengthen Capacities

Empower local stakeholder

Scaling requires a supportive ecosystem of government partners, local partners and communities. In addition to stakeholder legitimacy and willingness to support scaling and operations at scale, it is critical to build appropriate capacities in the local ecosystem. These need to be created systematically along the scaling process to match the nature of the intervention and the context in which scaling takes place. When building capacity, it is important to consider the level of training required for local stakeholders to support implementation.

Build and strengthen team capacities

On the side of the implementing team, new structures and capabilities will have to be created iteratively along the scaling process to accommodate the dynamic development. Just as the solution must adapt to the context in iterative loops, the team and structure will also adapt and change based on the needs of the process. The required capacities can include all types of knowledge, skills and infrastructure needed for organisational development and depend on the individual situation of the implementing team.

Learn and Adapt

Build a minimal version

Scaling happens in complex environments where it is unpredictable what impacts and mutual effects will be generated by a solution. Therefore, it makes sense to plan the implementation of the solution in a way that allows for the rapid learning and adaptation of the solution. This is best achieved by defining what is the minimum functional version of the solution that can be implemented with as little effort as possible. The [Scaling Pilot Canvas](#) provides a starting point which is meant to guide your continuous iteration toward impact at optimal scale.

Learn continuously and collectively

Beside ad hoc data reviews and formal program evaluations continuous learning needs regular build- test-learn loops that create space for reflection and iteration. The [Scaling Strategy Validation Board](#) supports this journey toward impact at optimal scale. The process benefits from involving diverse partners and should be facilitated. Learning should be guided by hypotheses which can be tested to then define adaptations to your pilot. At times, this may also include more radical pivots, including shifts in your scaling strategy. It proved helpful to establish a baseline to measure conditions at the beginning of scaling, which then evaluates future progress against this baseline.

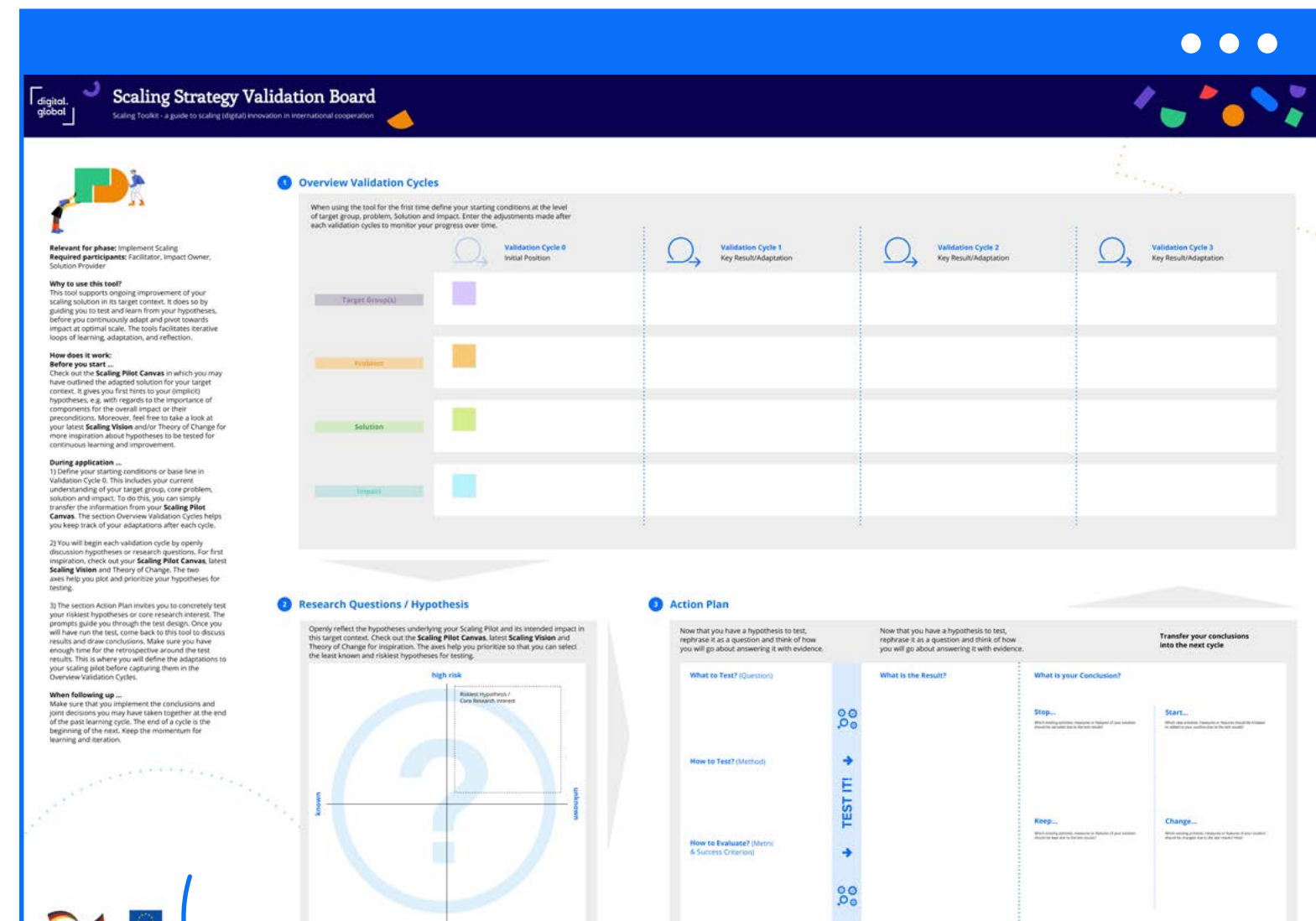
Improve and adapt solution and context

Driven by evidence and learning, the [Scaling Pilot](#) and solution is improved in regular build-test-learn iterations. The process of adaptation should be designed as co-creatively as possible, involving not only the implementation team but also key stakeholders. The [Scaling Strategy Validation Board](#) helps you draw conclusions from tests. This invites you to define adaptations, further adapting the solution and the context to each other for optimal scale.

Phase 04: Implement Scaling Helpful Tools

Scaling Strategy Validation Board

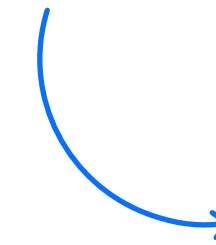
This tool supports ongoing improvement of your scaling solution in its new context. It does so by guiding you to identify, test, and learn from adaptations to the solution and/or scaling approach. The tool facilitates iterative loops of learning, adaptation, and reflection.



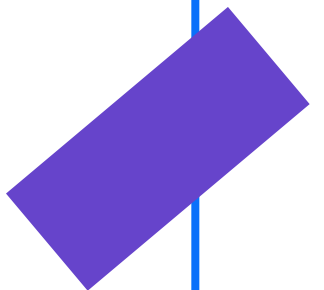
Additional Tools

...to iterate your impact in loops

Similar to your Scaling Strategy, some tools invite us to think iteratively on continuous build-test-learn-loops based on a minimum viable product or service. Consider the following tools for further inspiration.

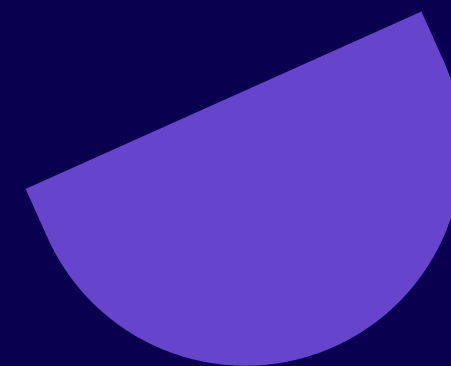
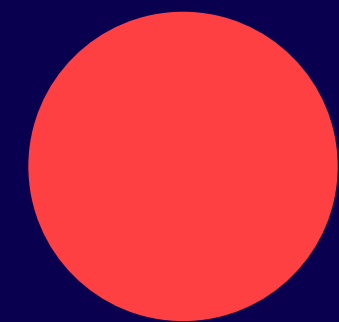
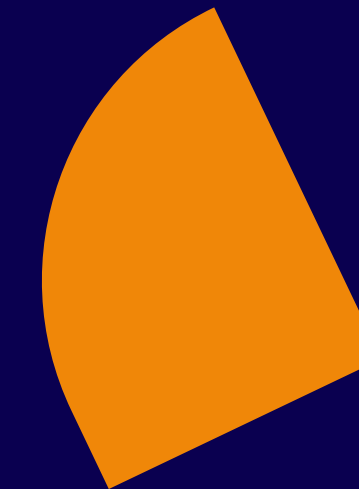
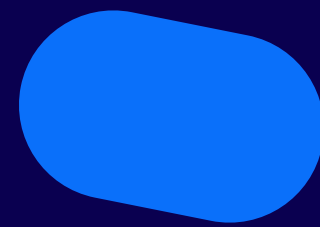
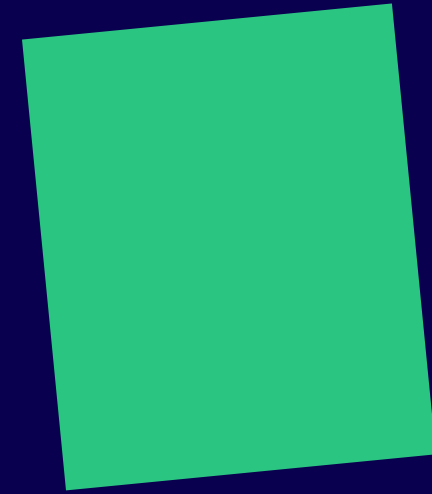
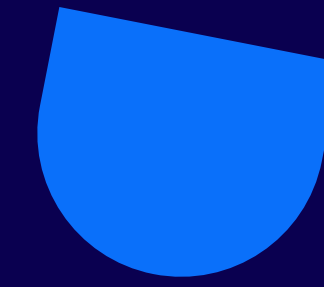
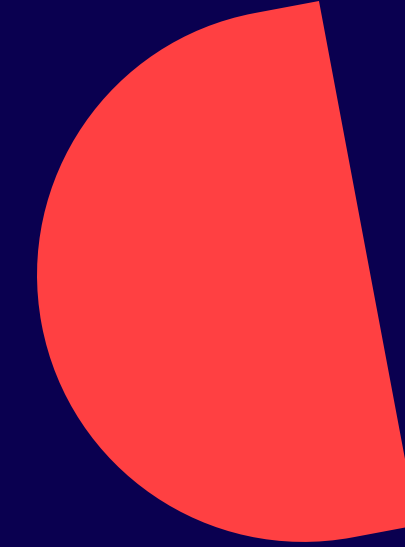
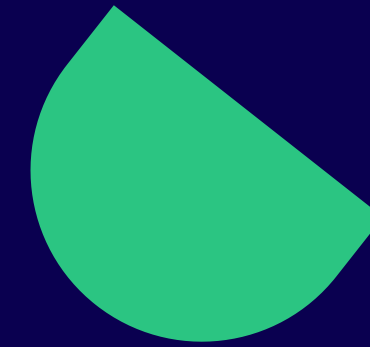
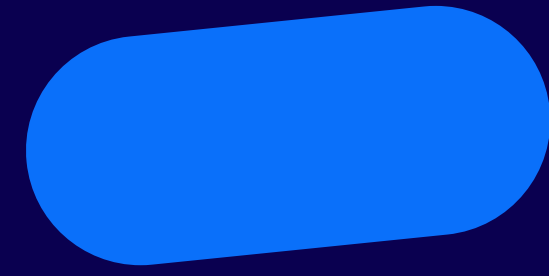
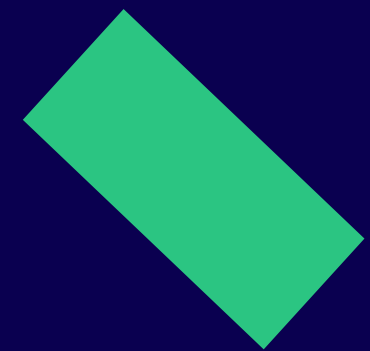


Implement Scaling


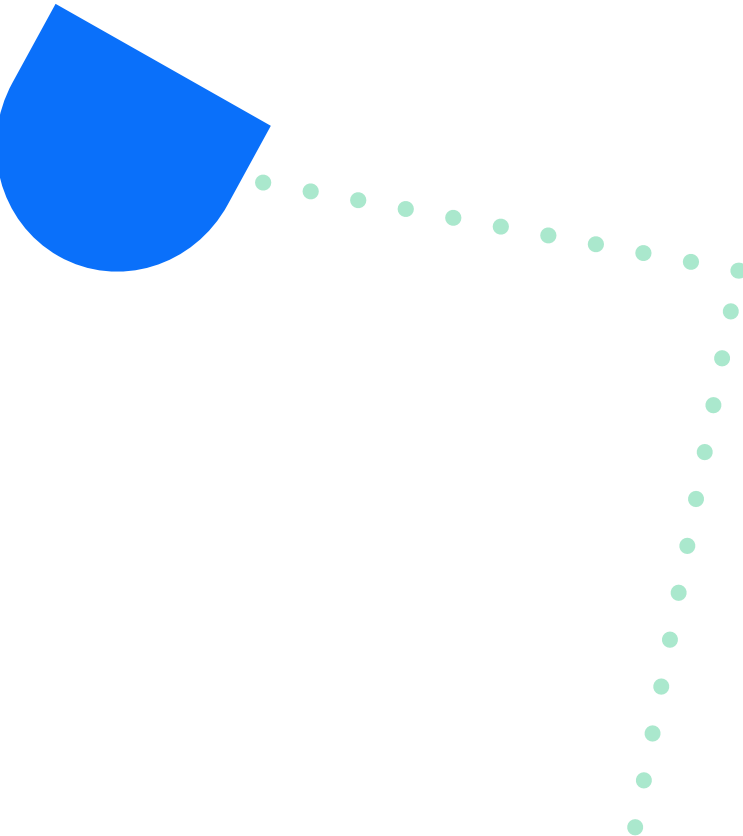


03

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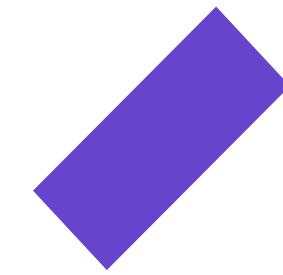
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Digital Public Goods Alliance and their Business Model Sustainability Toolkit

NESTA's Collective Intelligence Playbook, Principles for Digital Development Forum

Scaling Communities of Practice's Scaling Toolkit for Practitioners

UNSSC's Innovation Toolkit

UNDP's Strategy to Scale Social Innovation for Development Toolkit

UNDP Scale X's Ready to Scale Canvas

International Development Innovation Alliance Scaling Toolkit

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